T O U R I S M

GOLF TOURISM IN BRITISH COLUMBIA

A Market and Product Overview

ECONOMIC & REGIONAL DEVELOPMENT AGREEMENT

Canada

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GOLF TOURISM IN BRITISH COLUMBIA

A MARKET AND PRODUCT OVERVIEW

Prepared for :

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prepared by :

THE TOURISM RESEARCH GROUP
MICK COLLINS AND ASSOCIATES

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The Canada-British Columbia Tourist Industry Development Subsidiary Agreement is one in a series of subsidiary agreements under the Economic and Regional Development Agreement (ERDA) signed in November 1984, between the governments of Canada and British Columbia.

The responsibility for the content of this report is the consultant's alone, and the conclusions reached herein, do not necessarily reflect the opinions of those who assisted during the course of this investigation or the federal and provincial governments which funded the study.

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HON. BILL REID, MINISTER

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Department of Regional Industrial Expansion	Ministry of Tourism, Recreation and Culture	Ministry of Economic Development

EXECUTIVE SUMMARY

Because today's tourists are more active than ever before and want to participate, learn or experience, the distinction between recreation sport and tourism is becoming increasingly blurred. Despite this trend, golf as a generator of travel as well as a recreational activity has not been given the attention it deserves. Increased attention by the tourism industry is warranted for the following reasons:

1. **The market is large:** A minimum of 3.8 million rounds of golf are played in British Columbia each year and at least 500,000 of these rounds involve "tourists" ie golfers not resident near the course.

   There are twice as many golfers in America as there are skiers: 20.7 million Americans played golf in 1985 and spent $7.4 billion on the sport. Golf is growing at an average rate of 6% per year.

   Approximately 1.2 million Americans resident in British Columbia's primary tourist markets of Washington, Oregon, California, Arizona, Texas, Montana and Idaho play golf 40 or more days a year.

2. **The market is attractive:** Participation in the sport tends to increase with income, age, and education. Not only do many golfers have the means to travel, they like to travel and play golf. Over half of the frequent players group (ie golfers playing 40 or more times a year) take at least one golf vacation a year.

3. **The market is relatively easy to identify and reach:** (87% view golf on T.V.; 54% read golf publications and 19% belong to a private club).

4. **The market is expanding:** The golfing population is expected to double by the year 2000. As baby boomers,who currently account for 42% of today's golfers become older, participation is expected to increase.

5. **There is considerable interest in the market place in British Columbia as a golf destination:** According to *Golf Digest* magazine, Canada currently attracts a 4% share of the Golf vacation market which is quite impressive given the relative lack of marketing and promotion by Canadian facilities and resorts compared to their American counterparts.

As of the summer of 1986, there were 72 18-hole and 68 nine-hole courses in British Columbia of which over half were located in Vancouver Island and Southwestern B.C. The single most important factor affecting the ability of individual clubs to cater to visiting golfers is type of ownership. Of the 140 clubs in B.C., 91 are municipal and public clubs, 36 are semi private and 13 are private. While the private clubs are often the best known and most frequently sought after, they have the least available capacity to cater to non-members. There is a serious shortage of public courses in Greater Vancouver and to a lesser extent Victoria. As a consequence, many tourists find it difficult to get access to the course of their choice at peaks times.

British Columbia has relatively few courses that form part of a large resort complex.

Approximately 30 clubs, equivalent to 20% of the total are currently involved in packages and over 70 would like to participate in the development of golf packages oriented towards non-resident visitors.

The present and potential market for golf-related tourism can be categorized by origin and type of trip or motivation for the trip. In the latter classification, the following three segments have greatest market potential: the *ardent recreational golfer*, the *casual recreational golfer* and the *corporate/executive golfer*.

The *Ardent Recreational Golfers* are golfers who come to British Columbia in order to play golf. Some purchase a package which combines green fees, accommodation and transportation; others travel independently. They are frequent players, prefer challenging and well-known courses, demand quality accommodation and service and, provided this quality is assured, are prepared to pay high prices. Competition for this market, especially in the resort sector is severe. The origin markets with greatest potential for generating golfers in this segment are: Alberta, California, Washington, Oregon and Japan.

For the *Casual Recreational Golfer* playing golf is incidental to the main purpose of the trip and may or may not enhance the vacation experience. While larger in terms of numbers than the Ardent segment, their per capita expenditures and economic impact are less significant.

This segment is less demanding in terms of courses and associated tourist facilities and contains a broader cross-section of golfers in terms of skill levels and buying power. British Columbia's strengths with respect to this market lie in the fact that a large number of the municipal and semi private courses, including the 9-hole facilities located away from urban centres are not operating at full capacity and would benefit from more non-resident business.

The *Corporate/Executive Golfer* segment comprises business visitors who wish to play golf during their stay. Despite statistics compiled by *Meetings and Conventions* magazine indicating that over 30% of all meeting planners included golf tournaments in their meetings, the demand for golf facilities by this market in B.C. was found to be quite modest. Partly because of the perceived lack of capacity and partly because of a lack of awareness of its potential, the effort to promote golf in B.C. to the meetings market has been limited.

The market segment with the greatest long term growth potential and positive economic benefit is the Ardent Recreational Group out of Alberta, Washington-Oregon, California and Japan.

Albertans appear to be most interested in fly-drive packages to Vancouver Island in the shoulder months of Spring and Fall; resort-based packages in the B.C. Rockies from April to October; and packages involving both green fees and lodging in Kootenay Country and the Okanagan.

There are over 561,000 golfers in Washington and Oregon. British Columbias appeal is a lack of congestion on the courses—particularly during mid-week - and the perceived dollar value. Our chief weakness is the lack of full-service, relatively large resort complexes that offer an array of complementary activities, après-golf night life and good shopping. While the Kootenay Country and B.C. Rockies tourism regions have enjoyed considerable success with golf promotions in Spokane, little has been done to market B.C. golf in Portland and Seattle.

The state with greatest long-term potential is California, followed by Arizona and Texas. The five outbound tour operators based in California, who assisted with this research, all consider British Columbias' golf potential to be fair to excellent. They perceive our strengths to be in our people, the beauty of the province, the price advantage and the fact that Western Canada as a golfing destination is relatively new and undiscovered. They do not like the difficulties experienced in reserving tee times several months in advance.

The Japanese market for golf could also be tapped provided British Columbia develops and implements both a development and marketing strategy. British Columbia's golf product is attractive because of the price, the aesthetics, and the relative lack of crowding. The weaknesses to be overcome are mostly developmental: Japanese tour operators need to be able to make block booking in advance and want the best quality hospitality and retail services for their clients.

Despite the excellent market potential for golf tour development into British Columbia, marketing efforts have up until recently been modest, fragmented and unco-ordinated. There is an urgent need for the following:

- to educate the tourism industry about the potential for golf and to educate the golf community about tourism;
- to develop both a marketing and development strategy that would ensure adequate supply of the right kinds of facilities;
- to increase the number and improve the quality of golf tour packages;
- to market golf packages under a "*Canada West*" umbrella.

The following report presents ten marketing and three development recommendations which are considered essential first steps to realizing the potential of the golf market. Golf tourism in British Columbia is at a crossroads: unless there is a commitment to integrate regional efforts and create awareness of what the province has to offer in its long-haul markets then there will not be the incentive to build better product; conversely, unless there is a willingness to upgrade and improve both the facilities, services and packages to serve this discriminating market, golf tourism will continue to take a back seat to other sectors of the tourism industry and its potential will remain unrealized.

CHAPTER ONE: INTRODUCTION

1.1 BACKGROUND

The steady growth of tourism in British Columbia has been accompanied by some major changes in the marketplace and the way the travel industry markets its products. What was once described as a "mass tourism market" in the fifties and sixties has literally splintered into a myriad of micro markets known as vertical interest groups. Instead of categorizing visitors according to their origin, travel marketers are paying considerable attention to the reasons why people visit a destination and the kinds of activities and experiences they are seeking to enjoy. Travellers are becoming more active; fewer of them are content to merely observe the passing scenery; more and more want to participate, to learn or "experience". As a consequence, the distinction between recreation, sport and tourism is becoming increasingly blurred. More and more tourists are expecting to participate in their favourite recreational activity or sport while away from home on vacation and, therefore, chose their destination based on their expectation that the facilities and environment for that sport or recreation will guarantee an enjoyable experience.

It is in this context of growth and change in the tourism marketplace that this overview of the golf tourism market was initiated.

1.2 OBJECTIVES

The specific objectives of the study were:

1. To provide an overview of the existing and potential market for golf tourism in general and golf packages in particular with reference to:
    - Demand Sources
    - Package Types
    - Course Types
    - Seasons
    - Visitor Profiles
    - Market Segments
2. To assess the adequacy of golf facilities for golf packages;
3. To identify opportunities for the development of golf packages; and
4. To make recommendations for action with respect to the marketing and development of golf tourism.

1.3 METHOD

Six methods were used to accomplish these objectives:

1. Meetings with representatives of golf associations in British Columbia;

2. Telephone interviews with golf club managers throughout the Province;

3. Telephone and personal interviews with tourism industry representatives involved in the organization and marketing of golf packages in British Columbia;

4. Telephone interviews with tour operators, airline executives, cruise ship representatives and government personnel located in British Columbia's primary markets;

5. A review of existing literature on golf and tourism as it pertains to golf tours; and

6. An analysis of the media and promotional vehicles currently being used to reach the golf market.

The project was undertaken by two independent consulting groups over an eleven-month period. Most of the supply data was compiled by Mick Collins and Associates in the Spring of 1987. Much of the market information was either compiled or updated between January and February of 1988 by The Tourism Research Group. The Market Analysis, Conclusions and Recommendations for Action were prepared by The Tourism Research Group.

CHAPTER TWO: MARKET ANALYSIS

2.1 WHO PLAYS GOLF?

Golf in America

Golf in the United States is big business. According to the National Golf Foundation, approximately 20.2 million Americans played golf and spent $7.4 billion on the sport in 1985. Golf was the *sixth* most popular sport or recreation activity after swimming, fresh water fishing, bowling, bicycling and aerobics exercise classes.

The characteristics of U.S. golfers summarized below are derived from two sources: the National Golf Foundation's bi-annual Golf Consumer Profile and the National Sporting Goods Association's annual sports participation survey:

- **The majority of U.S. golfers are men.** Four out of every five players is male. There are more female players, on average, in the northwest region than elsewhere in the country (Table 1). Women's participation in golf is on the increase, however. In response to the special needs of women working outside the home, more and more courses are providing attractive day care facilities.

- **Participation in golf increases with household income.** Whereas only 8% of the population living in households earning U.S. $15,000-24,000 play golf; 17.5% of people living in households earning over $50,000 are golfers (Table 2).

- **Participation in golf increases with age.** Figure 1 shows the percentage of the golf population in each age group—23% of golfers are 20-29 year olds; 19% are over 60. Baby boomers, ie. the 25-40 year olds, represent 42% of today's golfers, and according to many industry analysts will cause a significant increase in the demand for golfing facilities and golf vacations. Frequency of golf play rises significantly with age, as the player has more leisure time and greater discretionary income. Figure 2 shows that 28% of golfers over the age of 50 account for 40% of all rounds played. As the baby boom population ages, participation in golf is expected to increase significantly.

Table 1
SELECTED RESULTS FROM THE NATIONAL GOLF FOUNDATION 1983 GOLFER PROFILE STUDY

SELECTED RESULTS	ALL GOLFERS	NORTHWEST	SOUTHWEST
Male %	81.4	73.5	80.4
Female %	18.6	26.5	19.6
Retired %	27.5	17.9	27.8
Median Age (Years)	48.8	42.3	43.0
Over 45 Years %	55.8	45.2	46.1
Reside on Golf Developments	10.1	4.8	8.0
Median Distance Residence to Course (Miles) %	4.2	2.7	3.4
Median Household Income ($)	37,000.00	33,000.00	34,000.00
Over $40,000 Household Income %	45.0	33.4	34.0
College Education	68.9	63.9	65.2
Median Rounds Per Year	62.5	65.4	57.0
Median 18 Hole Score	87.	87.4	85.2
Median Beginning Age (Years)	25.5	28.2	24.0
Participants in Golf League %	45.9	60.7	49.5
Carries Established Handicap %	73.4	83.1	62.4
Taken Lessons from Pro %	68.0	69.0	68.6
Planning Golf Vacation %	**57.2**	**66.3**	**49.5**
Most often plays 9 holes %	20.2	65.5	73.5
18 holes %	79.8	65.5	73.5
Median Rounds Played Using Golf Cart %	23.8	15.8	21.7
Owns Golf Cart	7.1	13.1	1.0
Median Annual Expenditures $			
• Golf Cart Rentals	104	63	87
• Green Fees/Dues	400	332	336
• Equipment	146	143	142
• Golf Clothing at Club	86	88	73
• Golf Shoes at Club	60	56	53
• Golf Clothing/Shoes Elsewhere	81	74	72
ANNUAL TOTAL (SUM OF MEDIANS)	877	756	763

Source: National Golf Foundation *1983 Golfer Survey Analysis of Results*

Table 2
RELATIONSHIP BETWEEN GOLF AND INCOME

INCOME BRACKET	PERCENTAGE PLAYING GOLF %	NO. OF PEOPLE ('000)	PERCENTAGE OF GOLFERS
Under $15,000	4.6	2,686	13
$15,000-24,999	7.0	3,444	17
$25,000-34,999	9.5	4,227	21
$35,000-49,999	12.5	5,453	27
$50,000 plus	17.5	4,212	22
		20,022	100%

Source: National Sporting Goods Association, Sports Participation in 1986.

- **Seniors are an important target.** While persons over 60 years comprise 16.5% of all golfers, they account for 33% of all rounds and 26% of all spending. They play twice as many rounds as the rest of the population and are more likely to take a golf vacation. There are 3.3 million senior golfers in the U.S. and 1.6 million are located in the south and west.

- **Interest in golf varies regionally.** Figure 3 shows participation rates broken out by state and a golf intensity index that combines per capita variables such as facility supply, equipment purchase, participation rates, golf magazine subscriptions. While golf is most important in the midwest and northeast, of importance to British Columbia are the states of Washington, Montana, Idaho, Texas and Arizona. The state of California has currently the lowest availability of courses per capita but the largest proportion of frequent players. Table 3 shows the number of frequent golfers (ie. adults playing 40 more days a year) in a number of U.S. states.

- **Golfers are a relatively easy market to identify and reach.** According to the National Golf Foundation survey, 87% view golf on T.V.; 54% read golf publications at least once a year, 19% subscribe to such publications and 19% belong to a private club.

Figure 1
PERCENTAGE OF GOLFERS IN EACH AGE GROUP

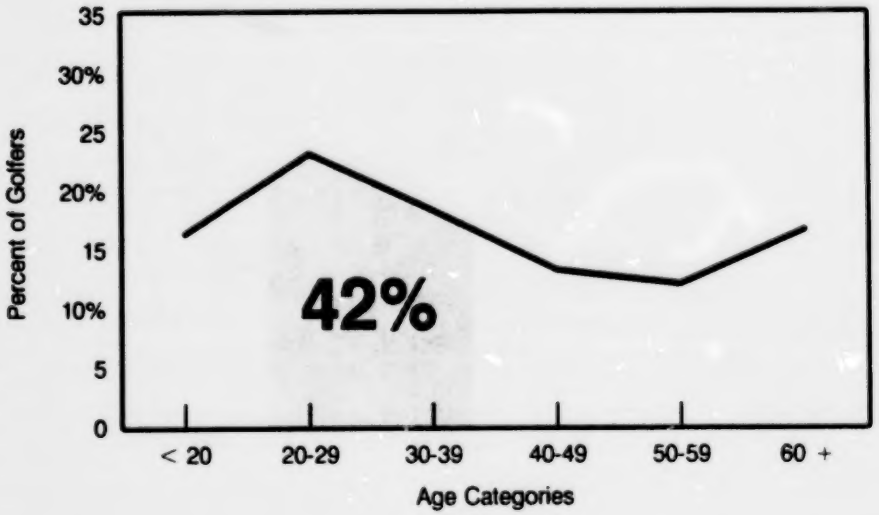


Figure 2
NUMBER OF GOLFERS AND ROUNDS PLAYED BY AGE CATEGORIES

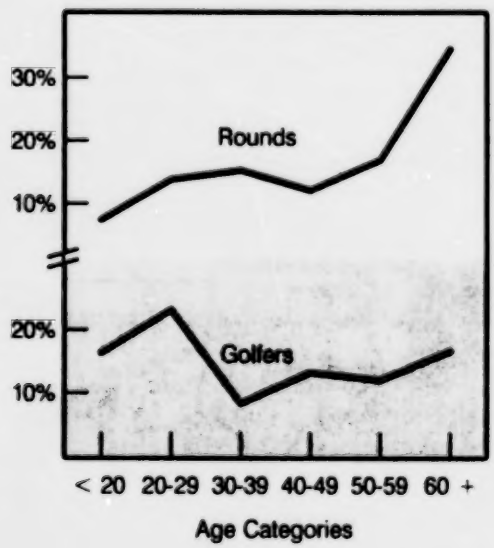
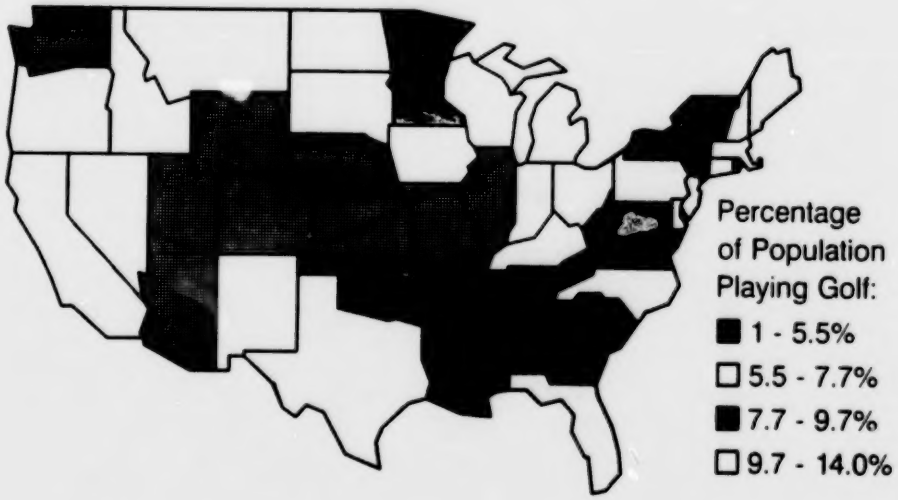


Figure 3

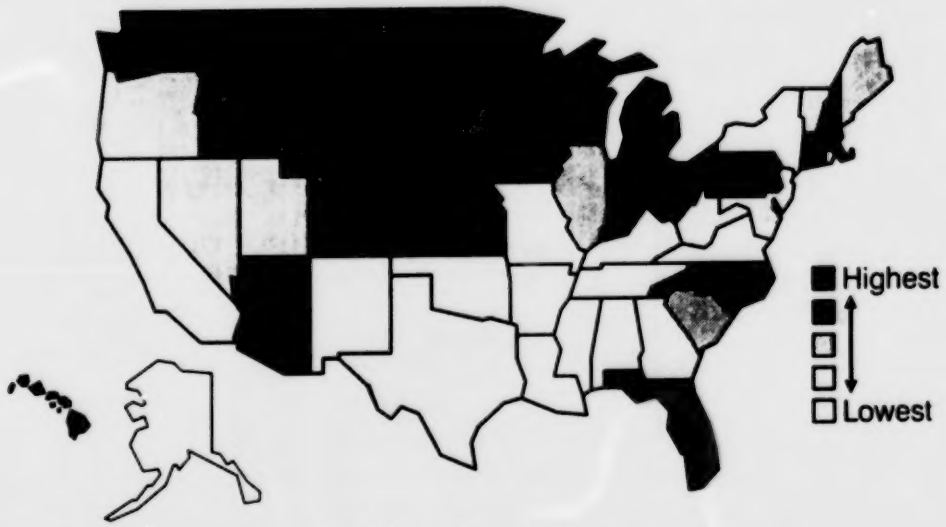
Golf Participation



Source: NGF/Market Facts, Inc.

Figure 4

Golf Intensity



Source: Rooney, Adams Golf Involvement Index

TABLE 3

NUMBER OF FREQUENT GOLFERS IN SELECTED U.S. STATES

STATE	GOLFERS PLAYING 40+ DAYS/YEAR
Washington	52,000
Oregon	29,000
California	687,000
Arizona	89,000
Texas	296,000
Montana	3,000
Idaho	14,000

Source: National Sporting Goods Association, Sports Participation Survey, 1986.

Table 4

GOLF PARTICIPATION RATES BY PROVINCE IN 1976

PROVINCE	POPULATION 14+ YEARS ('000)	GOLFERS ('000)	PARTICIPATION RATE %
Canada	17,542	1,911	11
Prince Edward Island	88	13	15
Nova Scotia	612	42	7
New Brunswick	505	32	6
Quebec	4,818	329	7
Ontario	6,349	847	13
Manitoba	758	97	13
Saskatchewan	692	96	14
Alberta	1,341	172	13
British Columbia	1,903	278	15

Source: Statistics Canada *Participation in Tennis and Golf, October 1976*

Golf in Canada

In 1981, approximately 14% of all Canadian adults played golf at least once a year, equivalent to 2.5 million Canadians. According to data published by the Canadian Golf Foundation for 1985, approximately 1.5 million Canadians play more than 15 times a year. The most recent source of information regarding golf participation on a provincial basis dates back to 1976. Table 4 showed that participation rates vary from province to province with B.C. and P.E.I. leading the rest of the country.

Canadian Golf Foundation statistics for 1985, which profile the more frequent Canadian player, confirm the importance of both baby boomers and seniors to this sport: 44% of frequent Canadian golfers are aged 25-54 and 43% are over 55.

Table 5 shows that Canadian golfers, like their American counterparts, tend to be better educated and more affluent than the rest of the population.

Table 5
EDUCATION AND INCOME LEVELS OF CANADIAN GOLFERS IN 1976

	POPULATION[1]	GOLFERS[1]
EDUCATION	%	%
0 - 8 years	25	6
Some high school	49	52
Some post secondary	9	15
Post secondary certificate or diploma	10	13
University degree	7	14
ANNUAL INCOME		
Not reported	11	7
None	16	10
Less than $4,000	26	22
$ 4,000 - $6,999	11	7
$ 7,000 - $9,999	11	10
$10,000 - $14,999	14	20
$15,000 - more	11	24

[1] Golfers and Population 14 years and over

Source: Statistics Canada *Participation in Tennis and Golf, October 1976*

Golf in Canada has been growing at about 6% a year on average and, of all sports tracked by Statistics Canada, experienced the third highest growth rate after cross-country skiing and alpine skiing.

2.2 WHO TRAVELS TO PLAY GOLF?

The 1985 National Golf Foundation (NGF) survey of approximately 1,900 golfers investigated where Americans go for golf vacations and how long they stay. The golf trip was defined as a trip away from home that involved an overnight stay and at least one round of golf. The surveys found that while 32% of the total golf population had taken a golf vacation in the twelve months preceding the survey, propensity to take a vacation was strongly correlated with frequency of participation. Thus over 50% of "heavy participants" had taken a golf vacation. Golfers who were members in private clubs were also more likely to be golf vacationers.

Table 6 presents an age breakdown of the American golf vacationer. Just under 20% of all reported golf vacationers were seniors. Many seniors vacation in southern climates and would, by the definition of a golf trip, classify the seasonal migration as a golf trip. The statistics confirm this, showing that 35% of all senior golf lasted over 20 days. Other golfer trips average 10 days in length.

Table 6
AGE DISTRIBUTION OF GOLF VACATIONERS

AGE	%
7-20	8.2
20-29	17.9
30-39	20.6
40-49	17.3
50-59	16.3
60+	19.7

Average Age: 43 years

Source: National Golf Foundation, *Consumer Profile, 1986*

The average golf vacationer takes just over two golf trips per year. Seniors also tend to take longer trips and play more rounds of golf.

Table 7 ranks the major destinations of golf vacations as recorded for participants in the NGF survey. The top three ranked states, Florida, South Carolina and Arizona which make up 33% of the market is no surprise. The northern states of Pennsylvania and Massachusetts have been successful in capturing considerable quantities of weekend trips from the metropolitan areas which, according to the NGF are chronically underserved by golf.

Table 7
LEADING DESTINATIONS FOR GOLF VACATIONS

Florida	17.3%
South Carolina	8.0%
Arizona	7.6%
California	6.0%
North Carolina	5.9%
Pennsylvania	4.4%
Texas	4.3%
Massachusetts	4.5%
Michigan	3.4%
Wisconsin	3.2%

Source: NGF Consumer Profile, 1986.

Another source of statistical information concerning golfers on vacation is the *Golf Digest* subscriber survey. This magazine enjoys a circulation of 1.3 million throughout North America; its subscribers tend to be better educated, more affluent than the golfing population as a whole and as a consequence more inclined and able to take a golf vacation. Of the readers surveyed by the magazine, 92% had taken a golf vacation of 3 days or more in the previous 12 months and of those travellers, the average was 3.4 vacations a year involving in total 22.7 nights away from home. These travellers are clearly the cream of the golf vacation market. During their last main vacation, the average *Golf Digest* subscriber spent $1,880 on a trip lasting 10.7 days—or $191 per vacation day. Of considerable interest were the destinations visited by these travellers.

According to *Golf Digest*, Canada currently attracts a 4% share of this lucrative market which is equivalent to Hawaii at 4% and Arizona at 4%. This share should be considered impressive given the relative lack of marketing and promotion by Canadian golf courses and resorts compared to their American counterparts. Discussions with the publishers of the key golf magazines in the U.S.A. as well as representatives from PGA Tour, Golf Digest, the Golf Card organization and outbound golf tour operators all revealed significant interest in Canada as a golf destination but low levels of awareness as to what facilities we have to offer. Unfortunately, similar information on Canadian golfers vacation habits was not readily available during the course of this study.

2.3 WHERE DO BRITISH COLUMBIA'S GOLF VISITORS COME FROM?

In order to place "golf tourism" in perspective, it is necessary to have an overall appreciation of British Columbia's tourist markets. The major tourist markets for British Columbia in 1985 are listed in order of importance as follows:

- British Columbia particularly the Vancouver and Victoria areas;
- Rest of Canada particularly Alberta;
- United States, particularly Washington, Oregon and California; and
- Overseas countries, particularly Japan.

Table 8 shows selected key characteristics of these four major markets in 1985. Three features of British Columbia's tourist markets are particularly noteworthy:

- The importance of frequent, repeat visitation from the closest markets of Alberta and Washington State and also British Columbia residents;
- The relatively long average length of stay and hence total expenditures of overseas visitors; and
- The growing strength of the U.S. market, particularly California.

Table 8
SELECTED CHARACTERISTICS OF BRITISH COLUMBIA'S MAJOR TOURIST MARKETS IN 1985

MARKET	VOLUME Visitors (Person-Trips ('000))	%	LENGTH OF STAY Average Stay (days)	Person Nights ('000)	%	EXPENDITURES Daily Expenditures ($)	Expenditure Per person-Trip ($)	Total Exp's ($'000,000)	%
British Columbia	5,600	45.1	4.0	22,400	36.2	45.50	182.00	1,019	42.4
Other Canadians	3,190	25.7	6.8	21,692	35.0	32.00	218.00	694	28.8
United States	3,180	25.6	4.2	13,350	21.6	38.00	160.00	508	21.1
Overseas	446	3.6	10.0	4,460	7.2	41.50	415.00	185	7.7
TOTAL/AVERAGE	12,416	100.0	5.0	61,908	100.0	39.50	244.00	2,406	100.0

Source: Tourism Highlights, 1985

Table 9 shows the regional market share for each of the 9 tourism regions in 1985. As can be seen, over half of the tourist activity takes place on Vancouver Island and in Southwestern British Columbia. This is a substantial concentration with far-reaching implications for all aspects of the tourism industry: investment, facility development, training and marketing. This concentration is paralleled, to some extent, in the supply of golf facilities and in existing patterns of the use of these facilities by visiting golfers. Figure 5 indicates the boundaries of the tourism regions.

Table 9
SHARE OF BRITISH COLUMBIA'S TOURISM MARKET BY TOURISM REGION, 1985

REGION	SHARE OF VISITORS %	SHARE OF REVENUE %
Vancouver Island	20	22
Southwestern B.C.	29	33
Okanagan	13	12
Kootenay Country	4	4
High Country	8	6
B.C. Rockies	12	9
Cariboo	4	4
North by Northwest	7	8
Peace River, Alaska Highway	4	2
	100	100

Source: Highlights '85, Ministry of Tourism

A Vancouver Island
B Southwestern BC
C Okanagan - Similkameen
D Kootenay Country
E High Country
F Cariboo
G North by Northwest
H Peace River - Alaska Highway
I Rocky Mountain

Figure 5

Source: Tourism Highlights 1985.

British Columbia Tourism Regions

Vancouver serves as the major gateway into British Columbia, especially for United States and overseas residents. Studies of Washington and Oregon residents and Seattle area residents conducted prior to Expo 86 showed very limited awareness of British Columbia, apart from the top two tourist destinations of Vancouver and Victoria. A similar study of Alberta residents showed the importance of south-eastern British Columbia and the Shuswap and Okanagan areas as tourist destinations for Albertans.

British Columbia's Golf Markets

There is no single source of primary data currently available regarding the origin of visitor golfers to B.C. facilities. The following assessment of British Columbia's golf markets is based on discussions with regional tourism managers, operators of golf packages, publishers of golf magazines, etc.

1. *British Columbia Resident Market*
British Columbian residents currently comprise over 45% of the tourism market in this province and constitute a potentially important source of customers for golf experiences. The market source of travel in general and golf-related travel in particular is the Lower Mainland where there is a higher incidence of affluent, well-educated households and an above-average participation rate in golf (17% compared to 11% for Canada as a whole). In 1976, there were 164,000 golfers in Vancouver, a number which will have exceeded 200,000 by 1985, given national growth rates for this sport.

The British Columbia Golf Association has 25,000 members and 135 member clubs and the B.C. Branch of the Canadian Ladies' Golf Association has 13,000 members and 130 member clubs. One measure of the popularity of golf vacations is derived from the survey of golf club managers. Respondents were asked to estimate the proportion of their members who take golf vacations within or outside of British Columbia. The proportion varies considerably from club to club but, as a general rule, between 10% and 30% of golf club members take at least one golf vacation a year outside the Province, especially during the winter months. Popular destinations are Europe, the U.S., Australia and New Zealand. Much of the golf travel by British Columbians within the Province is related to inter-club tournaments and amateur championships, rather than vacations. Those regions in British Columbia which have experienced greatest success in attracting golfers from the Lower Mainland are Vancouver Island, Okanagan, Kootenay Country and B.C. Rockies. These visitors can be categorized as follows:

- urban residents taking mini-vacations, or short get-away breaks that involve a few rounds of golf and overnight accommodation. Courses south of Nanaimo and around Victoria are best suited to capture this rubber-tire market. The introduction of attractively-priced fly-drive vacations will bring the Kootenays and Okanagan within reach of the keen Vancouver golfer;

- residents on longer touring vacations who take their clubs and wish to play golf as a supplementary activity;

- residents seeking a golf resort experience at either Whistler, Radium, Fairmont or Harrison Hot Springs.

2. *Alberta and Saskatchewan*

Albertans currently account for 18% of the total tourism market and show good potential for golf tourism into British Columbia. In 1985 there were an estimated 200,000 golfers in Alberta with over 80% of them living in Calgary and Edmonton. A shortage of courses in the urban centres, lack of capacity in the scenic, resort-oriented courses of Banff, Jasper and Kananaskis, combined with a short playing season, all create pent-up demand for golf by Prairie residents. While many travel south in the winter to resorts in Arizona and southern California, the strength of the U.S. dollar is reducing both frequency and length of stay. Golf packages on Vancouver Island in the shoulder season (March-May and October-November) are proving popular with limited marketing. One Victoria-based hotel recently introduced a fly-drive package involving 4 nights accommodation, greens fees on three courses and a rental car for $525 which sold out very quickly. Thirty percent of these golfers are retired and 70 percent are 35 to 55, senior executives earning over $40,000. They are described as keen golfers who play hard and want to be assured access to quality, scenic courses. Partly as a consequence of this success, the Tourism Association of Vancouver Island (TAVI) is putting together a golf insert in Fore! Magazine and has promoted golf at consumer shows in Edmonton and Calgary. Nearly all TAVI's golf inquiries originate in Alberta.

The prairies are an important source of visitors for the golf resorts located in the B.C. Rockies, Okanagan and the Kootenays. Up to 90% of the Albertan golfers arrive by car but many have pre-reserved or purchased the golf packages that combine lodging with green fees.

3. *Washington and Oregon*

Visitors from these two states make up the third largest source of visitors to British Columbia. In 1986, 2.1 million residents of Washington and Oregon visited British Columbia and spent $375 million. There are over 561,000 golfers in these two states equivalent to 8% of the population. Of this total, 286,000 play at least ten times a year. British Columbia's appeal is the lack of congestion on the courses—particularly during mid-week—and the perceived dollar value. Many senior Americans can travel north for a mid-week golf vacation for prices significantly less than in the United States. Our chief weakness is the lack of full-service, relatively large resort complexes that offer an array of complementary activities, après-golf night-life and good shopping outlets. The popularity of Vancouver Island with Seattle residents could be exploited among the golfing community particularly in the Spring and Fall when lack of capacity at popular courses is not a problem. Whistler is also promoting mid-week packages to this market and building upon enhanced awareness of the resort. The Kootenays and B.C. Rockies have enjoyed considerable success with golf promotions in Spokane and, to a lesser extent, Cœur d'Alène.

4. *California, Arizona, Texas*

The states of California, Arizona and Texas are becoming an increasingly important source of long-haul visitors to British Columbia, especially since Expo 1986. In that year, California generated 1.3 million visitors and preliminary estimates for 1987 suggest that traffic from this source may surpass those volumes. Of particular relevance to the marketing of golf is the concentration of affluent retired or semi-retired golfers in southern California, Arizona and, to a lesser extent, Texas. The population of total golfers and frequent golfers is significant as shown below.

Table 10

GOLFERS IN CALIFORNIA, ARIZONA AND TEXAS

STATE	TOTAL NUMBER	NO. OF FREQUENT GOLFERS[1]
California	2,005,000	687,000
Arizona	298,000	89,000
Texas	1,017,000	296,000
TOTAL	3,320,000	1,072,000

[1]Play 40 or more rounds a year

In spite of the current limited penetration by British Columbia of the U.S. golf vacation market, there is no doubt that this market has major potential on the basis of size, spending power and growing awareness and appreciation of Canada and British Columbia as a vacation destination. California alone represents a huge potential market for British Columbia golf vacations. It has a population approximately the size of Canada's population of 25 million people. The buying power of Californians is higher than the national average, and continuing population and economic growth prospects are good. Californians, like residents of all the Western States, travel more than residents of other U.S. regions both at home and abroad. While Canada is the most popular foreign destination for U.S. residents, only 3.4% of Americans have visited Canada in the last three years according to statistics published in the 1986-87 Sunset Western Market Almanac. The incidence of travel to Canada is considerably higher from the Western States than it is from the Southern States.

The following statistics from the 1986-87 Sunset Western Almanac are derived from the 1984 Market Facts, Inc., Sunset Western Survey. They demonstrate relatively high participation rates of residents of the Western States in golf and tennis while they are on foreign trips. The 13 Western States are Washington, Oregon, Montana, Idaho, Wyoming, California, Nevada, Utah, Colorado, Arizona, Nevada, Hawaii and Alaska. For respondents reporting foreign travel during the previous three years, 5.3% of Western State residents had participated in tennis or golf while on foreign trips compared to 3.9% in the rest of the U.S. Identical proportions (10.7%) of respondents from the Western States and the rest of the U.S. respectively had travelled domestically during the past 12 months and participated in tennis or golf on these trips. Unfortunately tennis and golf are not differentiated in the published results, but the data is broadly indicative of the potential of markets in the Western States in particular to participate in golf during trips abroad.

The strengths and weaknesses of the B.C. golfing product as related by Californian-based tour operators and airline executives interviewed for this project are as follows:

Strengths

- courses are perceived to be aesthetically outstanding—residents of these southern states enjoy the brilliant greens, the prevalence of trees and unspoilt natural settings;

- our cooler summer weather conditions are attractive;

- the favourable exchange rate makes B.C. prices competitive;

- British Columbia can offer a range of quality supplementary activities such as sports fishing and skiing in environments that contrast vividly with the highly developed, semi-urban resort environments throughout the southern states;

- awareness of British Columbia as an attractive destination is still high thanks to the success of Expo 86.

Despite these strengths, British Columbia has a number of serious obstacles to overcome:

Weaknesses

- lack of awareness of our golfing facilities. Residents of these states are exposed to very little information about our courses and specific communities that would offer golf vacations. Few, if any, Canadian courses/resorts can afford to advertise in the specialty golf magazines; we have so far done very little to obtain publicity and editorial coverage. We are not currently on either the PGA, the LPGA Tour or the Senior Tour which would give B.C. both the T.V. coverage and the equivalent of a "Good Housekeeping" stamp of approval;

- most residents of these markets would wish to come during the peak summer months of June, July, August when they would be assured the sunny weather and warm temperatures. It is at this time that popular B.C. golf facilities on Vancouver Island, or in and around Vancouver, are most congested. The challenging, international standard courses are most popular and least able to entertain large influxes of people. (Several outbound wholesalers based in Los Angeles and San Francisco indicated that they had had problems getting both tee-off times and lodging during the peak season);

- unlike many American states, British Columbia has relatively few deluxe golf resorts that can offer a full range of services, amenities and recreational opportunities. Affluent Americans from these states are used to a wide choice of eating facilities, good après-golf night life and shopping. All of these attractions together with cool summer golf in an aesthetic mountain setting are available in such competitive resort settings as those found at Lake Tahoe and Colorado. The wholesalers indicated that their clients want golf combined with good dining, shopping and entertainment. If this is not available in a resort setting, they prefer to play golf near or within an urban centre. Facilities such as the University Golf Club, which has aggressively marketed its public course as if it were a private club in a rural atmosphere adjacent to Vancouver's downtown core, have enjoyed successes with both the recreational and American corporate market;

- relatively few fly-drive packages have been developed by outbound tour operators and golf pro's based in California, Arizona and Texas. The consultants located 5 tour operators based in California who either have brought tour business into B.C. or would like to do so. Several indicated that Americans are looking for "new" golfing destinations. We identified very few golf courses who have so far aggressively pursued the California market. Clearly there is both a need and an opportunity to educate the golfing communities in those markets regarding what B.C. has to offer.

4. *Japan*

The Japanese travel market is a highly specialized one with substantial growth potential for British Columbia. The characteristics of this market are documented in a publication distributed by the Tourism Industry Association of British Columbia (TIABC) entitled *Marketing the West Coast Travel Product, Selling to Japan, A Handbook for Tourism Operators*. Major outbound destinations for Japanese tourists include Asia (50%), North America (35%) and Europe (10%). Vancouver is the primary gateway to Canada for Japanese travellers, and British Columbia received about 160,000 Japanese tourists in 1987.

Japanese visitors to Canada are typically on 8-10 day package tours which frequently include Vancouver, Calgary and Banff and may also include other major North American destinations such as Toronto, Montreal, Quebec City or Los Angeles. The average duration of their stay in Canada is only 6 days of which only 2 or 3 may be spent in British Columbia. Package tour prices normally range from $2,500 to $4,500. Spending by Japanese visitors in Canada averages about $100 per person a day or $600 per trip. The Japanese travel market represents about $100 million nationally and about $40 million provincially a year. The 3 major Japanese travel markets are single, working people between the ages of 18 and 30, particularly young women; honey-mooners; and retired couples over 55 years old. Peak travel periods are March, late April/early May and July/August.

Golf is popular in Japan and very expensive. An article in the Globe and Mail of January 15, 1987 *Costly Clubs are Par for the Course* documents the importance of membership in a golf club as a symbol of wealth and status. There are about 1,500 golf clubs in Japan and land suitable for golf course development is extremely limited. Memberships are a tradeable commodity. There are about 1.8 million memberships which may trade for over $1 million each. Members of the prestigious Kogane Club, for example, are shareholders and own the valuable land on which the club sits. A membership in this club costs up to $2.5 million. For those who cannot afford golf club memberships, driving ranges are popular. Some of these are built like parkades with nets to catch the balls. The prices of green fees for a day of golf in Japan range from $100 to $250.

Hawaii serves as a major golf vacation destination for Japanese visitors on golf trips often paid fully or partially by their employers. Japanese tourists in Hawaii commonly play 36 holes a day from dawn to dusk. Green fees in Hawaii average $50-$75 U.S. a day and are modest by Japanese standards. Golf packages featuring major British Columbia and, possibly, Alberta courses, combined with excellent transportation, accommodation and food services should have substantial market appeal in Japan. Canada and British Columbia have a positive image among Japanese travellers as a safe, hospitable, clean destination with fresh air and wide open spaces. The prospect of playing on beautiful, uncrowded courses should be very attractive to Japanese golfers, especially if the courses are renowned in golf circles. The development and marketing of such packages requires considerable experience and expertise in co-operating with major airlines and travel trade companies which are used to dealing in this specialized market.

Discussions with inbound Japanese tour wholesalers and those suppliers who have successfully begun to cater to this market identified the following strengths and weaknesses of the B.C. product:

- *Strength*
  British Columbia's golf product is attractive because of the price, the aesthetics and relative lack of crowding;

- *Strength*
  British Columbia is already an attractive destination in Japan and awareness is high;

- *Weakness*
  Few of British Columbia's golf courses are that well-known to the Japanese; courses which have hosted international tournaments and therefore had extensive T.V. coverage tend to acquire more status and prestige in the eyes of the Japanese. On the other hand, since golf is so difficult and expensive to play in Japan, many Japanese vacationers would appreciate the opportunity to play on less well-known courses provided the right kind of services and amenities were provided;

- *Weakness*
  Japanese tour operators are used to dealing both in large groups and high volumes—to acquire and retain their business the golf course must be able to guarantee both the capacity and the quality of service that this market requires—few courses of international reputation are available to this market. Japanese tour operators need to be guaranteed tee times at least six months in advance of play; very few B.C. courses are prepared to guarantee tee times more than seven days prior to play for anything other than very small groups;

- *Weakness*
  The number of destinations and golf courses with both the capacity, the range of services and amenities and a desirable location to satisfy this market are relatively few at the present. In Vancouver, the U.B.C. Golf Club has had some significant success because a) it has aggressively pursued this market by developing positive relations with the Japanese Travel Bureau and the Japanese Businessmens' Associations and b) it has developed the products and services the Japanese wish. Particular emphasis is given in the pro shop, for example, to ensure that suitable retail inventory is available. The average Japanese golfer spends $1800 a year just on equipment and clothes.

While Whistler's reputation and popularity with Japanese wholesalers is improving each year, the Japanese summer market is still not as active as the winter ski business. Japanese business takes a long time to develop but patience and persistence can pay off. Up to 80% of all rounds of golf played at Banff Springs are played by Japanese. Harrison Hot Springs Resort, which was recently purchased by Japanese interests, is planning to expand its golf course to an 18-hole course and, with the right kind of supplementary health and recreation facilities could penetrate this market.

The Japanese market for golf related experiences ie. special golf-oriented packages or short add-ons or options to existing itineraries is well worth pursuing for a variety of reasons:

i. outbound growth from Japan is expected to double in the next five years;

ii. since the Japanese spend significant sums on retail purchases, lodging, food and beverage, their impact on the golf course and supporting services on a per capita basis is far greater than guests from other sources. As a consequence the return on marketing efforts is greater;

iii. most of the Japanese business is handled by a relatively small number of tour operators, many of whom have offices in Vancouver

iv. the provision of golf facilities by B.C. owned or managed course operators would provide additional means whereby Japanese tourism expenditures could directly benefit the provincial economy

5. *Eastern Canada and Eastern Seaboard of the East Central region United States*
The golf market out of Eastern Canada and the Eastern Seaboard may have some potential over the long run for the following reasons:

- interest in Western Canada as a vacation destination has increased slightly over the past few years—whereas Eastern Canadians comprised 7.6% of our visitor market in 1979; they accounted for 13.5% in 1987;
- Golf participation rates in Ontario and the U.S. states bordering the Great Lakes are very high;
- Cross Canada airline fares have been reduced thanks to airline deregulation and the introduction of competitive charter operations.

2.4 MAJOR MARKET SEGMENTS BASED ON TYPE OF TRIP

In addition to segmenting the market on the basis of origin, it is equally useful to categorize golf tourists on the basis of type of trip or motivation for the trip. The methods used to reach each segment differ as will the type of product required. After extensive discussions with represenatatives of the travel industry and the golfing community, the consultants identified the following three major segments as having greatest market potential: the *ardent recreational golfer*, the *casual recreational golfer*, and the *corporate/executive golfer*. Each of these segments will now be described and their potential evaluated. Methods of reaching these markets will be outlined in the next section.

The Ardent Recreational Golfer

These are golfers who come to British Columbia in order to play golf. Some purchase a golf package that combines green fees, accommodation and possibly a rental car and airline transportation; others will travel independently. In Chapter 3 the types of packages currently available in B.C. are described. This market segment consists of people who are already keen golfers, who play frequently and belong to golf clubs in their home area. Regardlesss of their origin, they tend to exhibit the following characteristics:

- they prefer challenging and well known courses;
- they demand quality accommodations, and high levels of service; many seek the amenities of a large scale resort or, in the absence of that, prefer to stay in an urban centre and play on nearby courses;
- provided quality is guaranteed, they are willing to pay relatively high prices.

The ardent recreational golfer can be found at three types of golfing destination: *urban, rural and resort.* Vancouver and Victoria constitute the two main urban centres capable of attracting the most ardent recreational golfers; resorts such as Whistler, Fairmont, Radium and Harrison attract the second largest numbers of ardent recreational golfers and courses in more rural locations such as Central Vancouver Island, Kootenay Country and the Okanagan, while having lesser appeal, can attract a significant number of this type of golfer with the right kind of packaging.

While the ardent recreational golfer represents the cream of the golfing market in terms of demographics—above average incomes, 35 + in terms of age, professional, executive occupations—care should be taken to match price to the quality of product delivered. The competition for this market is severe, particularly in the resort sector. Ardent recreational golfers in the U.S., Canada and Japan are actively sought after by such competitive destinations as Hawaii, California, Nevada, the Carolinas and Florida. In the February issue of *Golf Digest* for example, the South Carolinas produced a 24-page insert advertising their golfing product which included details on over 35 four-season resorts dedicated to golf.

Ardent Recreational Golfers can be attracted from four major non-resident sources: Alberta, California, Washington and Oregon and Japan.

Albertans appear to be most interested in the following:

- fly-drive packages to Vancouver Island in the shoulder months of September-November or March-May;
- the potential for similar packages to the Lower Mainland (Vancouver, Whistler, Harrison and possibly including Semiahmoo) is probably equally good, especially mid-week, but has yet to be tested;
- resort-based packages in the B.C. Rockies from April to October; and

- packages involving both green fees and lodging in Kootenay Country and the Okanagan-Similkameen.

The five outbound tour operators based in *California,* who assisted with this research, all consider British Columbia's golf potential to be fair to excellent and believe we have the facilities necessary to attract golf vacationers to B.C. They perceive our strengths to lie in our people—they like the hospitality experienced in B.C.—the beauty of the province and the aesthetics and greenness of our courses, the price advantage created by the exchange rate and the fact that Western Canada as a golfing destination is relatively new and undiscovered. They do not like the fact that most courses will not guarantee tee times months in advance and several have had difficulties dealing with either hotel or transportation companies. The operators also indicated that the programs which included resorts in Banff and Jasper still outsold those that focused exclusively in B.C. All operators would like to be better informed about the courses and supplementary recreational activities that the province has to offer.

American Airlines is very interested in developing golf packages and sees golf as a growth area; *Delta Airlines* is already closely associated with golf through its sponsorhip of the PGA Tour and would like to work with British Columbia. *Canada Express*, an inbound tour company owned by Canadian Airlines International would consider including golf packages in its 1989 brochure once the potential had been demonstrated.

The *Washington—Orgeon* market has not been developed to a great extent except in Spokane. Both Kootenay Country and the B.C. Rockies have promoted golf vacations in Eastern Washington with considerable success. Residents of Washington State account for 10% of the room nights sold at Whistler in the summer of 1987 and most of these visitors came from Seattle. While the golf market from Eastern Washington is primarily a "rubber-tire" market, the potential for mid-week, shoulder season, fly-drive packages out of Seattle and Portland warrants further investigation.

Perhaps the market with greatest long-term potential in terms of numbers and expenditures is *Japan.* The local representative for Japan Travel Bureau suggested that of the 120,000 Japanese currently staying two nights or more in Vancouver, as many as 50% would welcome a golf experience. The major obstacle preventing the realisation of this potential is the lack of courses and the difficulty in being able to book large numbers of tee times at least 6 months in advance. Most of these Japanese golfers are the least demanding of the ardent recreational segment when it comes to the challenge of the course but they are mostly interested in courses that are well known and come with high quality retail and hospitality services.

The Casual Recreational Golfer

For the purpose of this study, the casual recreational golfer is defined as someone who plays golf while on vacation but for whom the chance to play golf is not the main purpose of the trip. Playing golf is incidental to the main purpose of the trip and may or may not enhance the vacation experience. In terms of numbers, this segment is probably larger at the present time than the Ardent Recreational Golfer

segment. In terms of per capita expenditures and economic impact it is less significant. This segment is less demanding in terms of courses and associated tourist facilities and contains a broader cross- section of golfers in terms of skill levels and buying power.

The decision to play golf at a particular time or course will likely be a relatively impulsive one and, unlike the ardent group, this segment does not do much advance planning. As a consequence, they need to be made aware in a general sense of the golfing opportunities before they leave home and, once in the province, need to be informed of courses available to them by destination or route. Promotion of golf to this market through the provision of information can extend a visitors length of stay in a community and thereby increase the net benefit derived from tourism traffic.

British Columbia's strengths with respect to this segment lie in the fact that a large number of the municipal and semi-private courses, including 9-hole facilities located away from urban centres are not operating at full capacity and would benefit from more non-resident business. Until all courses keep records of where their players come from by rounds played, however, it will not be possible to determine the precise size of this market. After discussions with several golf pros, golf managers and representatives of the B.C. golf media, the consultants estimate that over 3.8 million rounds of golf are played on B.C. courses each year. Studies of Vancouver Island golf courses estimate that they derive between 15 and 25 percent of all rounds played from tourists. If Casual Recreational Golfers account for only 10% of the provincial total, then the total number of tourist golfers in this segment, who golf in B.C., would be 380,000.

The origin of the Casual Recreational Golfer is most likely to match that of the touring visitor. According to Visitors 87, 68% of the non-resident visitors who are on touring vacations come from the United States and an additional 10% come from Alberta.

The Corporate/Executive Golfer

This segment comprises people who are visiting British Columbia on business attending conferences, product launches, sales seminars etc and who wish to play golf during their stay. The numbers of people involved in such golf outings can range from a foursome of executives to groups of over 100 conference delegates playing in a specially arranged tournament. According to a Sports Survey conducted by *Meetings & Conventions Magazine* and published in their July, 1985 issue, 32% of association delegates and 45% of corporate attendees at a resort use the golf facilities between business sessions. In the same survey some 41% of association and 52% of corporate planners holding business events at resorts said that the availability of golf courses, tennis courts etc was a decisive factor in their site selection process. Table 11 shows the frequency with which meeting planners arrange golf tournaments and Table 12 shows the most important features of golf facilities as rated by association and corporate meeting planners.

In order to assess how important this market segment was in British Columbia, the consultants interviewed several sales managers for hotels in

Vancouver and Victoria as well as representatives of the Vancouver Trade and Convention Centre, Tourism Victoria and the ground handlers who make the arrangements. The general concensus of this group indicates that there is currently only modest demand for golf by meeting planners and conference delegates in Vancouver and Victoria. Most interest has been expressed by the organizers of incentive programs. The ground handlers and hotel sales personnel all indicated a difficulty in getting their clients onto the courses of their choice. Partly because of the perceived lack of capacity and partly because of a lack of awareness of a potential market, the effort to promote golf in B.C. to the meetings market has been very modest. Virtually every person interviewed with respect to this market felt that both the development and market potential for this market was good and that more attention should be paid to it for the following reasons:

- golf can be played in the Lower Mainland and Vancouver Island in the shoulder months when convention and incentive activity peaks;

- participants on golf programs spend above average sums in the pro shops and are prepared to spend above average amounts on hospitality services providing the quality and ambience is provided; many corporate players want a country club atmosphere that they perceive to be available only in a private golf club.

In response to the growing demand for golf-related programs designed for this market a number of firms specialising in arranging tournaments and golf outings are being established. *Golf Plus*, based in Toronto, has been actively promoting golf as a tourism product in the Southern Ontario region for four years. They offer meeting and incentive planners a turn-key package of golf course selection, complete tournament organization and all support reqirements. This firm works in close cooperation with the Metro Toronto Convention and Visitors Bureau. *Golf Holidays*, also based in Toronto is offering a variety of corporate/ executive golf programs to complement a very extensive outbound golf package program developed for the leisure market. The following B.C. based companies were identified as arranging golf outings for this market as part of their "ground handling" services: *Cantrav, Contacts Pacific, International Conference Services, MacDonald Travel Corporation and Golf Holidays West.* The golf course that appears to be the most aggressive in pursuing this business is the University Golf Club in Vancouver.

Other Market Segments

Cruise line research has shown that golfers have similar socio economic and demographic characteristics to cruise passengers and several cruise lines have recently introduced golf programs in the Carribbean, Trans Panama and South Pacific. These programs are designed to encourage men to take cruises and are often marketed to golf pros. In order to differentiate their cruise from the competition, many cruise lines are adjusting itineraries to allow more time for on-shore golfing programs. The two major cruise lines who operate "intransit" ships to Alaska are Royal Viking Lines and Sitmar. Both lines operate shore excursions but at this point do not offer golfing as part of their shore excursion programme in either Vancouver or Victoria due to a lack of awareness of the golf product and a

perception that "tee times" were difficult to obtain for groups. The eight other cruise lines, which will offer Alaska in 1988, have shown little or no interest in golf product as part of a pre or post cruise itinerary.

There are a number of golf schools in the U.S. which attract large numbers of visitors each year. There is one golf school in British Columbia based at Qualicum Beach which currently attracts most of its students from British Columbia but is beginning to attract more clientele from out of the province. The long-term potential for further development of the golf school product is good provided that the necessary steps are taken to improve British Columbia's reputation as a golfing destination in the eyes of the ardent golfer described above.

Table 11
FREQUENCY WITH WHICH MEETING PLANNERS ORGANIZE TOURNAMENTS

FREQUENCY	CORPORATE PLANNERS %	ASSOCIATION PLANNERS %
Almost always	30	33
Frequently	24	29
Occasionally	30	21
Never	16	17

Source: *Meetings and Conventions Magazine*, July 1985

Table 12
GOLF FACILITIES OF IMPORTANCE TO MEETING AND ASSOCIATION PLANNERS

FEATURE	CORPORATE PLANNERS %	ASSOCIATION PLANNERS %
Number of Courses (holes)	25%	14
Flexibility of Starting Times	23%	26
Championship Courses	21%	29
Assistance in Organizing Events	14%	11
Green Fees and Cart/Caddie Fees	10%	11
Length of Course	4	1
Rental Equipment Available	3	4
Lessons available	1	1

Source: *Meetings and Conventions Magazine*, Sports Survey, 1985

2.5 METHODS OF REACHING THE GOLF MARKET

The purpose of this section is not to present a marketing strategy for increasing golf tourism into British Columbia but to outline those marketing vehicles that could be used in such a strategy.

Print Media

There are a number of specialty magazines available in North America that appeal to the golfer. There is also a strong correlation between magazine readership and propensity to take a golfing vacation. According to the National Golf Foundataion, 54% of all golfers read a golf magazine at least once a year and 19% subscribe to such publications. The following magazines constitute a selection of those magazines of greatest interest to British Columbia's primary markets.

Golf Digest, published by the New York Times Company has an annual circulation of 1.3 million readers and is the world's largest golfing publication. Second in terms of circulation is *Golf Magazine* with a circulation of 900,000 and third is *Golf Illustrated* with a circulation of 300,000. All three magazines have travel sections, offer their advertising clients special marketing/event promotion consulting services and tend to emphasize coverage of American courses, resorts, and destinations. Note: *Golf Illustrated's* travel section will be featuring Canada in August 1988. The demographic profile of their readership is illustrated in Table 13 and Appendix A. contains specific details on rates and marketing representatives. While advertising in such magazines is likely too expensive for most suppliers of golfing facilities in British Columbia, these magazines should be approached for editorial coverage. At the present time awareness of golfing facilities in Western Canada is very low. If golf tourism is to be attracted from our American markets it is vital that the print media be encouraged to publicize our product to their readers.

Score is Canada's largest golf magazine with a national circulation of over 150,000. The magazine is published five times a year by Controlled Media Communications which also publishes programs for the Canadian Open and du Maurier Classic Championships.

In British Columbia and Alberta the two publications catering to this close to home and resident market are *Fore! Magazine* and the *B.C. and Alberta Golf Guides*. Fore! Magazine is published 10 times annually and 15,000 copies are distributed free of charge to golf courses throughout British Columbia.

Television Coverage

The key to increasing awareness of British Columbia would ideally lie in television coverage of a major tournament such as the Canadian Open which is held annually at the Glen Abbey course in Ontario. This is the only Canadian stop on the pretigious PGA Tour. In 1988, the Vancouver Golf Club will host the equally prestigious duMaurier Classic as part of the LPGA's tour. But T.V. coverage is becoming harder to get as networks require that a major tournament obtain a large

Table 13
SELECTED DEMOGRAPHICS OF U.S. GOLF MAGAZINES

	GOLF DIGEST	GOLF MAGAZINE	GOLF ILLUSTRATED
Circulation:	1,300,000	900,000	300,000
Sex:			
Male	92%	93%	89%
Female	8%	7%	11%
Age:			
Under 18	2%	1%	n/a
18 - 24	2%	1%	
25 - 34	16%	17%	
35 - 44	20%	24%	
45 - 54	}	17%	
55 - 64	39%	21%	
65+	21%	20%	
Average Age	49.0	49.4	49.2
Median Age	51.2	49.1	
Education:			
Graduated College Plus	46%	49%	64%
Attended College	31%	27%	n/a
Graduated High School or less	23%	24%	n/a
Household Income:			
$50,000 or more	55%	53%	41.6%
75,000 or more	25%	26%	n/a
100,000 or more	14%	13%	n/a
Average Age	67,000	$67,500	$51,300
Median	54,000	52,600	
Occupation:			
Professional/Technical	22%	25%	54%
Management Administration	40%	51%	n/a
Other Business	12%	23%	n/a

corporate sponsor who can also purchase advertising time. The Canadian Open and du Maurier Classic are both sponsored by Imperial Tobacco which is banned from T.V. advertising.

Direct Mail

Since up to 19% of all golfers and 24% of golf vacationers belong to clubs, direct mail is a potentially effective way of reaching that portion of the golfing population that is most predisposed to purchase a golfing vacation. Direct mail can either be proactive—ie attempt to generate interest in a purchase or it can be merely reactive—ie respond to requests for information. At the present time in British Columbia, the only publication that describes the courses available throughout the province is the B.C. Golf Guide. Its content is restricted to descriptions of the golf courses. It contains very little general tourist information on regional attractions and, except where regional tourism associations have purchased full-page ads or inserts, contains relatively little information about travel packages. In response to requests for information about golf, the Minsitry of Tourism, Recreation and Culture currently sends out one of the "How Do You Do Golf" pamphlets produced for the Travel Info Network.

Golf Card International Corp

This corporation now has over 80,000 members who pay an annual membership of US$65.00 in order to enjoy discounts at 1650 participating golf courses and 300 resorts through North America. The courses offer two complimentary rounds of golf and the resorts offer discounts on their golf packages. The profile of the Golf Card membership is summarized in Table 14. Four resorts in B.C, participate in the Stay and Play program—Fairmont Hotsprings, Radium and Kokanee Springs and five courses participate in the golf course program. Golf Card International produces a bi-monthly magazine called the *Golf Traveller* which, in addition to providing a comprehensive course directory, also includes editorial coverage of golfing destinations.

Consumer Shows

There are a number of general sport-oriented trade and consumer shows aimed at travel influencers and consumers in our primary markets and a complete list can be obtained from the Trade Sales Section of the Ministry of Tourism, Recreation and Culture in Vancouver. *Golf Group '88* is one of the very few shows that specialises exclusively in golf travel products. Organized by Jerry Simon Associates, Inc. the show visits at least 18 U.S. cities in the Fall of each year and participating courses, resorts or golfing communities are able to meet and do business with at least 200 carefully selected golf tour operators, meeting planners, golf pro's who lead trips and travel agents interested in this sport. Several of B.C.'s regional tourism managers have attended these shows and found them to be very productive.

Wholesalers and Tour Operators

Despite the importance of golf as a recreational activity, the number of tour wholesalers and operators who specialise in golf vacations is quite small. Appendix B lists the key operators located in British Columbia's primary markets who were contacted for this study. All expressed interest and confidence in British Columbia as a golfing destination but felt that awareness of B.C. by their existing and potential clientele could be significantly improved.

Table 14
DEMOGRAPHICS OF GOLF CARD MEMBERS*

The average Golf Card Golfer:
is 61 years of age
has played golf for over 24 years
travels 11 weeks per year playing golf
73% play week day golf

- 72% hold private and semi-private country club memberships
- 96% plan golf as part of their leisure travel
- purchase 22,500 golf packages at an average of $413 each
- Golf Card members average 81 rounds of 18 hole golf per year
  16 rounds are on Golf Card Course
  10 rounds are played with Golf Card being honoured
  9 different courses are played using the Golf Card
- 85% want to play new courses
- 86% say the rules are easy to understand and follow
- 95% own or are buying a primary residence having a mean value of $115,700
- 34% are buying or own a secondary residence
- the average income exceeds $51,000 per year
- 85% have an investment portfolio of stocks, bonds and mutual funds averaging over $213,000

Source: *Membership statistics compiled by Market Facts, Inc., Chicago, IL (Dec. 86) for Golf Card International Corp

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CHAPTER THREE: PRODUCT ANALYSIS

This chapter of the report presents an overview of the supply of golf facilities and the supply of golf packages. Since most of the field work for this component of the study was undertaken in 1986, certain new developments may not be included.

3.1. GOLF FACILITIES IN BRITISH COLUMBIA

There are three main types of golf courses:

- Par 3
- 9 hole
- 18 hole

Par 3 courses are shorter courses which require considerably less land than 9 or 18 hole courses. They are sometimes known as "Pitch and Putt" courses. They appeal to beginners; less skilled; and older, less physically active golfers. They have very limited potential for golf packages and were, therefore, excluded from the Phase I analysis. Under certain circumstances they could possibly play a role in golf packages as practice or instructional facilities.

Nine-hole courses are typically developed in response to limited capital and land availability and appeal to golfers who are price-conscious or have limited time available. Green fees are normally less expensive at a 9-hole than at 18-hole courses. Eighteen hole courses generally serve golfers who have more time to play and, in the case of private clubs, more money to spend on initiation fees and annual dues.

Nine hole courses average two hours to play, and 18-hole courses, four hours. Many courses in the U.S. are longer than courses in British Columbia, and take five or six hours to play. The shorter playing times of some British Columbia courses may make them easier to package for tourists with busy itineraries.

Green fees for visiting golfers at most clubs in British Columbia range from $10 to $45 for 18 holes.

Table 15 shows the distribution by tourism region of the 9- and 18-hole courses among the 140 (non Par 3) courses in British Columbia.

The major concentrations of golf courses are on Vancouver Island and in the Southwestern B.C. tourism region. Together these two regions account for over 50% of all the golf courses in the Province. Nine-hole courses are especially common on Vancouver Island and 18-hole courses predominate in Southwestern B.C.

TABLE 15
NINE AND EIGHTEEN HOLE GOLF COURSES BY TOURISM REGION

TOURISM REGION		9 HOLE	% OF TOTAL	18 HOLE	% OF TOTAL		% OF TOTAL
A	Vancouver Island	22	32	9	12	31	22
B	Southwestern B.C.	9	13	35	49	44	31
C	Okanagan-Similkameen	7	10	8	11	15	11
D	Kootenay Country	9	13	3	4	12	9
E	High Country	6	9	4	6	10	7
F	Cariboo	0	0	3	4	3	2
G	North by Northwest	8	12	4	6	12	9
H	Peace River/Alaska Hwy	4	6	1	1	5	3
I	Rocky Mountain	3	5	5	7	8	6
TOTAL		68	100	72	100	140	100

Generally golfers who buy packaged golf vacations are keen golfers who expect to play on 18-hole golf courses. Well-known championship courses are particularly appealing. About half of the courses in the Province are, more or less, automatically excluded from being involved in all-inclusive, more expensive packages which would attract international markets or longer distance Canadian markets because they are only 9-hole courses. That does not, however, prevent 9-hole courses from being involved in lower cost packages designed for more local, recreational golfers.

Alan Dawe in his book, *The Golf Courses of British Columbia,* comments on the wide variety of landscapes in which golf courses are located. He played at 144 courses, of which 71 were 9-holers and 73 were 18-holers.Half of these courses are situated on hilly or mountainous terrain and half are relatively level courses. Longer courses range from 5,800 to over 6,700 yards. Shorter courses range from 5,800 down to 3,000 yards over 18 holes. Many major U.S. courses are over 7,000 yards long. The average number of acres for an 18-hole course in British Columbia is about 110, but they range from as few as 85 to as many as 200 acres. Scenic values, lengths, and total acreage are all important in shaping the character and market appeal of a course. Other significant course "personality" factors are the condition of the greens, width of the fairways and the size, location and difficulty of water and other hazards such as traps, bunkers and fairway trees. Tradition and status are also very important factors in contributing to the market appeal of a club.

One of the major factors in the enjoyment of a game of golf is that the course not be crowded with other golfers. Managing timing of the entry of players to the first tee (starting point) is one of the main functions of the club golf professional or "pro". During busy periods groups of up to four golfers typically leave the first tee at seven minute intervals so that they do not "bunch up" and impede each other's games. At commercial, profit-making golf courses which are common in the United States and Europe, the number and frequency of golfers through the first tee is one of the major measures used to establish and monitor revenue objectives.

There is currently a shortage of public facilities in Greater Vancouver and, to a lesser extent, Victoria. Many public courses are operating at peak capacity. Fraserview, for example, handles 90,000 rounds a year, University Golf Club is approaching 80,000. According to the Canadian Golf Foundation, there should be at least one regulation length golf course for every 50,000 people in a metropolitan area. With over 400,000 residents in the City of Vancouver, there should be eight courses instead of four.

There is a delicate balance at individual courses between comfortable use levels and adequate revenue generation. With members of private and semi-private golf clubs in British Columbia typically paying over $4,000 to join and over $500 in annual dues, the satisfaction of members with playing conditions is crucial to the continuing success of the clubs. Many clubs have a waiting list of over a year for new members. Lack of available tee (playing) times and concern over the possible alienation of members are the major reasons deterring golf club managers from becoming involved, or more involved, in golf packages for tourists.

The extent to which fears of overcrowding and the resulting dissatisfaction of local golfers acts as a deterrent to golf packaging, varies considerably from course to course. Apart from local differences in supply and demand conditions for golf facilities, the single most important factor affecting the ability of individual clubs to cater to visiting golfers on an individual or organized group basis is **type of ownership.**

There are four main types of ownership for golf courses in British Columbia; municipal, public, semi-private and private. The major features of these ownership types are summarized in Table 16. Of the 140 clubs in British Columbia; there are 91 municipal and public clubs, 36 semi-private and 13 private clubs.

Municipal governments such as Vancouver and Burnaby operate a number of courses. Although visiting golfers are welcome to play at Municipal courses on payment of green fees costing around $10 per person a day, package development is not normally encouraged, owing to heavy use by local tax payers. Public courses are open to green fee players although there are occasions when particular groups of members such as men, ladies or seniors have priority. Public clubs are generally interested in golf packages to supplement membership fees as a source of revenue.

TABLE 16
TYPES OF OWNERSHIP OF GOLF CLUBS

TYPE OF OWNERSHIP	CHARACTERISTICS
Municipal	• funded through local taxes • managed by municipal staff • most are 18 hole • no restrictions on public access • generally do not encourage golf packages due to heavy local use
Public	• owned by membership though initiation fees and annual dues • managed by elected Board of Directors • both 9 and 18 hole • few restrictions on public access • generally interested in golf packages due to open tee times and revenue needs
Semi-Private	• owned by membership through initiation fees, shares,annual dues and periodic assessments as required • managed by elected Board of Directors • most are 18 hole • variable restrictions on public access • variable interest in golf packages depending on the availability of tee times and revenue needs
	• owned by membership through initiation fees, shares, annual dues and periodic assessment as required • managed by elected Board of Directors • most are 18 hole • restricted public access through introduction by members or affiliation with other private clubs • generally very limited interest in golf packages due to priority given to member needs and satisfaction

Source: Various golf publications and original research conducted for this study.

Like public courses, semi-private courses can receive a local tax break because their fairways are open to green fee players. As the name implies, there are generally more restrictions on public access at semi-private clubs than public or municipal ones. Semi-private clubs vary considerably in their degree of interest in becoming involved in golf packages, depending on how busy they are and their revenue needs. The closer they are to private clubs with respect to exclusiveness, the less likely they are to be involved in golf packages. There are, however, a few examples of golf packages being developed with some renowned semi-private clubs.

Private clubs are designed exclusively for their members and generally restrict play to visiting golfers unless they are personally introduced by a member or are members of an affiliated club. Most private courses are not interested in catering to tourists on golf packages. There are a few examples where playing privileges are granted to visiting golfers in groups through special arrangements with companies in the tourism industry which specialize in deluxe quality services. The majority of private clubs are located in Southwestern, B.C.

Although golf courses have been categorized into four groups for convenience, there are often only subtle distinctions between individual courses particularly some semi-private and private ones. Even some "public courses" are privately owned and operated by a company rather than the members at large. The managers of company-owned and operated golf courses in particular are often keen to develop golf packages. Unlike most golf courses which are designed to break even, corporation-run courses are established to operate at a profit. These courses are the exception rather than the rule in Canada. Unlike many golf clubs in the United States and some European countries, most Canadian clubs are, by their nature, closer to non-profit societies in their philosophy, objectives and modes of operation than they are to private sector businesses.

Each golf course is unique in terms of its physical qualities and the human dynamics which make it work. Some golf clubs are much more disposed to becoming involved in golf packages than others. Even those that are very interested in participating in this kind of business, may require several months in order for the Board of Directors to approve the blocking out of available tee times for visiting groups of golfers. Golf packages designed for groups rather than individuals, couples or small parties may require negotiations with club managers at least a year in advance and preferably longer.

Appendix C provides an inventory of golf clubs in British Columbia. The number of golf packages (if any) at each club is noted in this Appendix.

3.2 THE SUPPLY OF GOLF PACKAGES IN BRITISH COLUMBIA

Provincial Overview

The number of golf clubs involved in golf packages and the number of golf packages in each tourism region is as follows:

	GOLF CLUBS	GOLF PACKAGES
• Vancouver Island	5	5
• Southwestern B.C.	2	14
• Okanagan/Similkameen	5	4
• Kootenay Country	9	16
• High Country	1	1
• Cariboo	1	3
• North by Northwest	1	1
• Peace River Alaska Highway	0	0
• Rocky Mountain	5	6
TOTAL	29	50

The majority of packages are concentrated at well-established tourism destinations and resorts such as:

- Victoria
- Parksville and Qualicum Beach
- Whistler
- Harrison Hot Springs
- the Okanagan Valley
- the Kootenays notably Kokanee Springs Golf Club
- the Rockies notably Fairmont Hot Springs Resort
- and Radium Hot Springs Golf Resort.

Apart from golf packages offered at 108 Mile Golf Resort, very few packages are offered in central and northern British Columbia. Figure 6 illustrates the distribution of golf clubs and resorts involved in golf packages.

Many clubs deal directly with tourist golfers who visit the clubs as individual travellers. About 10% use fairly informal arrangements with the tourism industry to attract customers, rather than formal packages. For example, some hotels refer their guests to specific golf clubs on request and assist them to book tee times. Such arrangements may be initiated by golf club managers or tourism industry operators. These kinds of arrangements can exist in any community with a golf course and an enterprising golf club, hotel or attractions manager. The relationship may also include discounts or special incentives for golf tourists. The Inn at Cowichan Bay on Vancouver Island for example, offers its guests access to local courses. In Vancouver, the University Golf Club has a number of ties to hotels such as the Bayshore, the Hyatt and the Hotel Vancouver. It also takes golf visitors from Gray Line Tours and those referred by tourist information centres. The Sunshine Coast Golf and Country Club receives extra business from its participation in the local Sea festival. The Meadowlands Club is developing links with Minter Gardens and other visitor services in the Chilliwack area to attract tourist golfers.

Informal business arrangements are not always between golf clubs and hotels. For example, the Nicola Valley Club and 7 Hills at Port Hardy both draw customers from local campgrounds. The Eagle River Club at Sicamous gets much of its business from people staying on houseboats. The Ponderosa Golf and Country Club, Kelowna, has links with local hotels and houseboat companies. The Spallamacheen Golf and Tennis Club gives discount vouchers for green times in the early afternoon to hotel guests willing to play during this slack period. These informal arrangements, while not constituting formal packaging, do indicate the interest of golf clubs in welcoming vacationing golfers. Appendix D contains a complete list and description of golf packages identified during the study. The major findings on package availability and receptiveness to further package development are summarized for each of the tourism regions in the following section.

A **EAGLECREST** · Qualicum Beach
ROYAL COLWOOD
GLEN MEADOWS · Victoria
UPLANDS
ARDMORE

B **WHISTLER**
HARRISON

C **GALLAGHERS CANYON** · Kelowna
SUMMERLAND
PENTICTON
TWIN LAKES · Kaledan
OSOYOOS

D **NAKUSP**
SLOCAN LAKE
KASLO
KOKANEE SPRINGS · Balfour
CASTLEGAR
CHRISTINA LAKE
ROSSLAND - TRAIL
BIRCHBANK · Rossland-Trail
CRESTON

E **SALMON ARM**

F **108 MILE**

G **MOLLYHILLS** · Fraser Lake

I **RADIUM**
FAIRMONT
KIMBERLEY
CRANBROOK

FERNIE

Figure 6

Golf Clubs and Resorts Involved in Golf Packages in British Columbia

REGIONAL SUMMARIES

Region A—Vancouver Island

Vancouver Island has 31 golf clubs of which five are currently participating in packages. Eaglecrest Golf Club at Qualicum Beach participates in a package with the Bayside Inn, Parksville. Response to a direct mail marketing program of this package in the Vancouver areas has been encouraging. Marlin Thompson's Golf School at Coombs near Qualicum Beach is packaged with four local tourist accommodation facilities including the Bayside Inn and students have access to Eaglecrest golf facilities. Island Executive Tours has packaged three Victoria clubs (Royal Colwood, Glen Meadows and Uplands) in a six night package. The Ardmore Golf and Fitness Club, Victoria offers discounts on green fees through three local tourist accommodation properties.

No other Island courses operate within a formal package but many of them link with hotels in informal business relations to serve visiting golfers. For example, Gorge Vale Golf Club in Victoria has informal arrangements with local hotels and is interested in developing packages. Most of the clubs on the Island welcome tourists individually or in small parties. Pacific Playgrounds, Qualicum, Cowichan, Nanaimo and Ardmore serve many visitors and would like more tourist business. The remaining courses vary from moderately to rarely busy. The less busy courses are predictably the less accessible ones such as Gabriola, Galiano, Pender Island, Pender Harbour, Port Alberni, Port Alice and 7 Hills in Port Hardy.

With the exception of a few clubs, all of the clubs in the region would like more tourists. Pacific Playgrounds, Gabriola, Galiano, Pender Island, Pender Harbour, March Meadows, Nanaimo, Port Alice, Eaglecrest, Sooke, Ardmore, Metchosin, Prospect Lake, and Gorge Vale for example would consider approaches from travel trade representatives about golf packages. The Tourism Association Vancouver Island (TAVI) did a limited promotion of a number of golf clubs in the Fall of 1986 featuring green fees and accommodation at nine tourist accommodation properties. The Association is planning to increase its activities in marketing golf tourism in the future.

Region B—Southwestern B.C.

This region has the largest number of courses of all the tourism regions and encompasses a wide variety of golfing conditions. Of the 44 golf clubs in the region, only two courses have packages and these are located at the geographical edges of the region; Harrison and Whistler. Golf at the Harrison course comes in 3- or 4-day packages with a room at the Harrison Hotel, meals and a variety of other features from back massages to bike rides. Three quarters of golf time at Whistler is played by visitors rather than local residents. Over a dozen hotels in Whistler offer golf packages. The Whistler Golf Club discounts green fee rates to hotels which are members of the Whistler Resort Association. From occupancy data supplied by the

Whistler Resort Association, we estimate that approximately 52,000 visitors stayed in hotel accommodation in Whistler between May—October, 1987. Of these visitors, 61% were B.C. residents and 10% came from Washington State. Interestingly, the third most important source of visitors at 8% was Ontario. Nearly 50% of these visitors were either part of a group, a corporately organized trip on a conference. Two more 18-hole golf courses are planned for Whistler: one near Green Lake, the other is being developed by CP Hotels as part of its resort complex. The total number of golf rounds available will increase from 50,000 at present to 150,000 a year.

The remainder of the courses in the region can be broadly categorized into two groups, one highly interested in more tourists and the other less interested because of heavy demands from members. The latter group includes Chilliwack Golf and Country Club, Capilano Golf and Country Club, Point Grey Golf and Country Club, Peace Portal Golf Course, Quilchena Golf and Country Club, Richmond Country Club, Greenacres Golf Course, Beach Grove Golf Course, Pitt Meadows Golf Club, Seymour Golf and Country Club and the Vancouver Golf Club.

The less busy group includes Burnaby Mountain, Ledgeview, Hazlemere, Meadowlands, Carnoustie, Meadow Gardens, Mission, Squamish, Powell River and Sunshine Coast which would all like more tourists and will consider packages. The University Golf Club, in Vancouver, is one of the busiest courses in the Province and has regular informal arrangements with the Bayshore, Hyatt, Vancouver and Meridien hotels. A large proportion of the 75,000 rounds played at the University Lands course are played by non members and bookings of tee times can be made seven days in advance. It is a good example of a course which facilitates play by visiting golfers.

Region C—Okanagan/Similkameen

Five of the fifteen clubs in this region are involved in golf packages. Gallaghers Canyon, Kelowna and Osoyoos Golf and Country Club participate in packages and Twin Lakes, Penticton, Summerland and Osoyoos are packaged with the Delta Lakeside in Penticton. The Capri Hotel package with Gallagher's Canyon has been selling well for the last three years in May, June, September and October as well as July and August. C.P. Hotels Lake Okanagan Resort has a new package with Gallagher's Canyon this year. The Ponderosa, Kelowna is developing a package with houseboat businesses. With the exception of one or two clubs which are very busy serving their members, most clubs are interested in more tourist business. Many of the courses benefit from business with individual travellers in this important tourist destination area. The Penticton Golf and Country Club for instance allocates a proportion of the 70,000 rounds played there annually specifically for visitors. Spallamachen, Ponderosa, Twin Lakes, Summerland, Osoyoos and Gallaghers Canyon for example would be interested in further package development.

In 1988, the Okanagan-Similkameen plans to spend up to $75,000 promoting golf in this region. Approximately 20,000 copies of a regional golf guide are being printed to fulfill requests for information.

Region D—Kootenay Country

Nine out of the twelve clubs in the Kootenay Country tourism region are active in packages through their efforts and those of the regional tourism association. Kokanee Springs is the most active with two in-house packages which include accommodation, meals and green fees. There were 2,667 package days spent at the resort in 1986. The course provides 23,000 rounds of golf a year, mainly for visiting tourists, and there are plans to expand facilities and business. Christina Lake and Castlegar have one package each combining food, accommodation and green fees. Slocan Lake, Kaslo, Rossland-Trail Country Club, Birchbank Golf Course, Creston Golf Course and Nakusp Centennial Golf Club have packages with local hotels for golf and accommodation. Nelson Golf and Country Club is too busy to handle regular package business but welcomes visitors during its slack periods. Salmo District Golf Club is interested in packages and more business, as are all the other Kootenay clubs.

This region is entering the third year of marketing golf packages through a special regional brochure. Primary markets include Alberta, Eastern Washington (especially around Spokane), Northern Idaho and Okanagan. In 1985 2,500 room nights were booked by golfers on packages. In 1986 this figure rose to 4,000. One 18-hole destination golf course has gone from 1009 package days in 1984 to 3815 package days in 1987. All golf courses have experienced a revenue increase of 30% or more since the program started.

Region E—High Country

Salmon Arm Golf Course is the only club in this region operating a golf package. It combines one round of golf with one night's accommodation and breakfast at three local hotels. This package attracted Alberta visitors who provide about half of the business. The package has not yet been promoted on the Coast, so business to date from Vancouver has been limited. The club has recently expanded to 18 holes and anticipates augmenting its green fee revenues which already account for a major proportion of total revenue.

Other clubs in this region have experienced some difficulties developing packages. The Eagle River Golf and Country Club considered packages but avoided package development because the surrounding area lacked adequate support facilities such as hotels and restaurants. Eighty-percent of its business is with tourists especially people renting houseboats. The Nicola Valley Golf Club had a package with a local hotel but it was discontinued. With only seventy members, the club gets 70% of its revenue from green fees and receives substantial business from a nearby recreational vehicle park. It would welcome ideas on packaging. The Merritt Golf and Country Club does not yet have a golf package but is interested in more tourist business. The Coquihalla Highway now puts Merritt within three to three-and-a-half hours from Vancouver. The Sunshore Club at Chase welcomes visitors but is too small to handle large groups. Kamloops Golf and Country Club, by contrast, has 800 members and many visitors including large parties, but it is too busy to participate regularly in packages. Overall the region draws heavily from Calgary and Edmonton. The Regional Tourism Association is working on the co-ordinated marketing of golf and tourist facilities in the region.

Region F—Cariboo

There are only three courses in the region: the Williams Lake Golf and Country Club, Quesnel Golf Club and 108 Mile Golf Clubs. The Williams Lake club is on a five year upgrading program and planning to market beyond its own region on a larger scale. The 108 Mile Golf Resort has been purchased by a new owner who is keen to expand the resort's active tourist business. Three golf packages are being offered in 1987 and promoted at travel trade shows in British Columbia and elsewhere in Canada. The 108 Mile Golf Club, located at the resort, is busy only during tournaments and corporate visits. Its corporate customers are medium size Canadian companies which comprise about 10-15% of its total business. The 108 Golf Resort is very interested in tourist business, packages and developing golf tours with other courses in B.C.

Region G—North by Northwest

The Molyhills Golf Club in the François Lake-Fraser Lake area is the only club in this region operating a package. It links with local hotels and restaurants and is promoted under the 'Glenannon' motif. The club is hoping to develop a northern escape package to market beyond its present market which is primarily Prince George. The Aspen Grove Golf Club in Prince George receives a large proportion of its revenues from green fees. It is expanding to 18-holes and is seeking a suitable package. The Skeena Valley course is also expanding its facilities and is keen to increase its summer visitor business.

The Carnoustie course at Burns Lake and the Willows Course at Sandspit on the Queen Charlottes receive few tourists but are most interested in developing this business and would welcome assistance from the travel trade. The clubs at Prince Rupert and Houston have limited interest in tourist business since they believe most tourists are in transit in their areas. The Prince George Golf and Curling Club is the only one in the region which is too busy serving members to cater to substantial numbers of tourists. The Regional Tourism Association is planning to contact the golf clubs in the region with a view to increasing promotion to tourist and package development.

Region H—Peace River Alaska Highway

There are four 9-hole golf courses in the region, Dawson Creek, Poplar Hills, Mackenzie, Moberley Lake and the 18-hole Lakepoint Golf and Country Club at Fort St. John. The Fort St. John club has a new club house. There are currently no packages being offered at any of the five golf clubs in the region but the Regional Tourism Association is planning to include golf clubs in a brochure.

Region I—Rocky Mountain

The two leaders in golf packaging in this region are Fairmont Hot Springs Golf Resort and Radium Hot Springs Golf Resort. The Fairmont "Par 72 Golf Package" includes accommodation for 3 nights, 3 days green fees and one meal. The resort is building a new course and driving range and looking to expand its business accordingly. Some guests fly to Fairmont's local airport from Alberta and other destinations. Radium's packages provide accommodation, green fees and use of all resort facilities. The resort is planning to develop more packages, encourage pre-booking and promote the mid summer seasons. Fifty one thousand rounds of golf were played at Radium in 1986, mainly by tourists. A second golf course is being developed in the Radium area. Although Panorama Resort does not have a golf course on site, guests can stay on packages and play at Radium.

Fernie, Kimberley and Cranbrook Golf Clubs are participating with Radium and Fairmont in the Rocky Mountain Visitors Association's golf directory for 1987. The Fernie Golf and Country Club offers golf and accommodation in one of eight local lodgings. Kimberley Golf Club is working with the Inn West/Kirkwood Inn to combine golf and accommodation. The Cranbrook Golf Club has a similar package with the Best Western Coach House Motor Inn. The Sparwood Golf Club has no packages but will have a new clubhouse in 1988 and may receive interest from local hotels in developing packages. Mountain Meadows needs a clubhouse to support such development.

The Rocky Mountain Visitors' Association has been one of the most aggressive regions of the province in terms of promoting golf. It produces a directory of courses in the B.C. Rockies, places advertisements in selected magazines and newspapers and has an aggressive brochure distribution program. Resorts with a central reservation number are also advertised on radio and TV. All the print advertising in 1988 will include a reader reply card that includes a questionnaire. The Association has found participation in Golf Group '88—a trade show that specializes in presenting golf travel products to be useful.

Assessment of Golf Packaging in British Columbia

Most of the golf packages in British Columbia are for one to three nights and many of them include some meals as well as green fees. They range in price from $40 to $60 a day **per person** based on double occupancy depending on the quality of accommodation and range of services provided. The packages are generally good to excellent value for money. The daily costs approximate regular room rates so, in a sense, the golf is being supplied "free of charge" as an incentive to stay at the particular tourist accommodation property. The green fees are normally valued in the $10-$20 a day range if the customer paid for them separately rather than as part of a package.

Even at resorts such as Whistler, 108 Golf Resort, Harrison, Fairmont and Radium Hot Springs, the packages are mainly in the $50 to $60 a day range per person based on double occupancy and include access to resort amenities such as swimming pools and saunas and in some cases additional golf services such as power carts and club cleaning. These prices are very competitive compared to prices elsewhere especially those at major resorts in the U.S. where golf vacation packages range from $50 to $100 (U.S.) a day per person based on double occupancy. With a 30% discount on the U.S. dollar in Canada, British Columbia prices are even more attractive to U.S. residents.

The most comprehensive golf package identified during the study is organized by Island Executive Tours Ltd. of Victoria. It is a 6 nights/5 days package and features golf at three major Victoria area clubs; Uplands, Royal Colwood and Glen Meadows. Green fees and daily transportation are included. Visitors bring their own clubs but the tour company takes care of all handling and transportation of the clubs. Three days are for golf and one day each are devoted to sight-seeing and salmon fishing respectively. There is a welcome breakfast and a wind-up awards dinner. Accommodation is at the Crest Harbourview Inn. Shopping and sight-seeing arrangements are made for non-golfers. The cost is $699 U.S. per person excluding travel arrangements to and from Victoria. The company assists in travel arrangements on request. The maximum number in each weekly group is 24 people. Strathcona Hotel has had success selling a mid-week, fly-drive package from Calgary or Edmonton that involves golf,rental car and sightseeing. It is a 5 day/4 night package that sells for $599. Their tours are indicative of the kind of creative tours which can be organized featuring other activities such as salmon fishing, sightseeing and shopping which would interest spouses as well as golfers.

Currently most golf packages are oriented towards fairly local markets in British Columbia, Alberta and Washington State. The flows of golfers on packages parallel general visitor flows and patterns throughout the Province to a large extent. On Vancouver Island and in Southwestern B.C., British Columbia residents, U.S. visitors and other Canadians predominate in that order. The proportion of Albertans increases in the Rocky Mountain tourism region and the Kootenays, and they frequent the Shuswap and Okanagan areas in the summer in particular. Two thirds of the guests at Kokanee Springs Golf Resort, for example, are from Alberta. Kootenay Country has been successful in attracting U.S. golfers from Spokane and other communities in Washington State and Idaho through co-operative public/private sector initiatives under the Partners in Tourism program. Generally the proportion of U.S. golfers declines the further north one goes.

There appears to be quite a broad socio-economic range attracted by the various packages and casual play at the many clubs which welcome tourists. In golf, opposites do not attract. People tend to go to those tourist destinations, resorts and clubs which they can afford and where they fit in easily. Although the majority of people buying packages are over 40, there are also younger golfers participating as well.

Golf packages normally run from April to October, the golf season in most regions of the Province. Vancouver Island, the Sunshine Coast and other parts of the Southwestern B.C. tourism region have a longer season. Golf can be played

year round on Vancouver Island. July and August are popular months for golf packages and business is generally quite brisk in the late Spring and early Fall.

In summary, British Columbia has a large number of basic hotel and resort packages which are reasonably priced and mainly cater to local markets. It is somewhat lacking however, in the more deluxe, all inclusive type of package that would appeal to relatively affluent, keen golfer markets in more distant market areas. There is a growing interest in the travel trade in developing this kind of package.

3.3 PRODUCT MARKET MATCH

The precise nature of the golf tourism product required by each market segment needs further investigation. Primary consumer research with a sample of golfers from the Ardent Recreational, Casual Recreational and Corporate segments will be necessary to determine their preferences, needs, and expectations as far as golfing opportunities are concerned. Without such primary data, it is difficult to analyze and evaluate the total mix of facilities available at a course from a visitors' perspective. This analysis of the facilities mix should include club-house, food, beverage, retail and après-golf amenities as well as access to accommodation, transportation and other attractions. Appendices C and D list only courses and packages respectively. Despite these limitations, the following generalizations regarding the relationship between product and market can be made.

Ardent Recreational Golfers prefer challenging and well known courses; demand high quality accommodations and service and seek these amenities at either a large scale resort or an urban centre. Vancouver and Victoria constitute the two main urban centres capable of attracting the most ardent recreational golfer; resorts such as Whistler, Fairmont, Radium and Harrison can attract the second largest numbers and courses in more rural locations such as Central Vancouver Island, Kootenay Country and the Okanagan, while having lesser appeal, could attract a significant number of the ardent recreational golfer with the right kind of package. The chief immediate constraint to realizing the market potential of this segment in the popular tourist regions of South Western B.C. and Vancouver Island is a lack of capacity on the courses sought after by this market. Many of the courses are privately run and non-resident play is not encouraged. The few public courses that have attractive facilities are running at peak capacity: Fraserview and University Golf Club are catering to 90,000 and 75,000 rounds respectively each year. This shortage of supply suggests a development opportunity for both the creation of new courses and the upgrading of those courses where capacity is not fully utilized.

According to meeting planners and industry personnel who handle the corporate/incentive market, this segment is slightly less demanding of a challenging course. Many participants in corporate tournaments are casual golfers out to relax and have fun with colleagues so they are as interested in the aesthetics, ambience and club-house amenities as the course itself. Since they do not wish to journey too far from the site of their business meeting or hotel, most demand from the corporate/executive market occurs in or around urban Vancouver and Victoria

where capacity is already strained or at resorts such as Whistler, Harrison, Fairmont, where there is still some room for expansion.

The majority of municipal and semi private courses, including the nine hole facilities located away from urban centres, are not operating at full capacity and would benefit from more non-resident business. The market most suited to these facilities is the Casual Recreational Golfer who needs to be directed to courses during his or her vacation.

CHAPTER FOUR: CONCLUSIONS AND RECOMMENDATIONS

4.1 SUMMARY OF MARKET OPPORTUNITIES

Context

The British Columbia tourism industry has not paid golf the attention it deserves given its overall importance as a recreational activity and as a potential generator of travel. To demonstrate this neglect, a few general comparisons with the ski industry are pertinent:

- The number of skiers in the United States, for example, is 9.7 million whereas the number of golfers exceeds 20 million.

- Golfers tend to participate in their sport more frequently than skiers. According to the National Sporting Goods Association, 24% of all golfers play 40 or more times a year; whereas only 12% of skiers ski more than 20 times a year.

- The B.C. ski industry generates approximately 2.6 million skier visits and of this total 94% are captured by 26 ski areas.

- The B.C. golf industry services an estimated minimum of 3.5 million rounds of golf at an approximate total of 140 courses around the province. This estimate of play is based on the assumption that 140 courses generate an average of 25,000 rounds of golf per year. This estimate is likely to be highly conservative. Fore! Magazine surveyed all the courses in Metropolitan Vancouver and determined that the average number of rounds played was 1.5 million, equivalent to an average of 36,000 rounds per course.

- Approximately 40% of the skiers surveyed as part of the Ministry of Economic Development's Alpine Skier Survey stayed overnight on their ski trip, which means that 884,000 are essentially "ski tourists".

- While no similarly "hard" data regarding the origin of golfers is presently available, discussions with a sample of golf course operators indicate that their non-local, tourist clientele range from a low of 5% to a high of 35%. If we assume that British Columbia's golf facilities attract 15% of the rounds played from golfers not living near the course then the current size of the golf tourism market could be approximately 500,000.

  While this estimate of 500,000 golf visitors is very "soft" and needs to be confirmed with rigorous survey research at participating golf courses, it does provide an order of magnitude to justify further investigation. If it is correct, then golf tourists outnumber "adventure" tourists by 4 to 1, cruise passengers by 1.5 to 1 and non-resident anglers by 5 to 1. Since skiing, adventure, cruise and sports fishing are all vertical markets to which both the

Ministry of Tourism, Recreation and Culture and the private sector have paid attention, there is sufficient justification to allocate some effort and resources to the golf sector.

Marketing Activity to Date

Efforts made to market the golf tourism product in British Columbia have up until recently been modest, fragmented and unco-ordinated. Individual tour companies and a number of regional tour associations have begun to recognize the potential of this market and to promote golf into their regions, but the initiatives have not been integrated provincially.

There appears to be only limited understanding of the travel industry on the part of golf course managers. Many golf "suppliers" ie club managers and golf "pros" are only marginally interested in marketing to non-residents as their first responsibility is to ensure their member's needs are satisfied. Many golf club managers—particularly on municipal courses—have not taken an aggressive, entrepreneurial approach to marketing their facilities to local residents due either to a lack of skills, a lack of appreciation of the market potential or a lack of motivation.

At the same time, there appears to be a lack of appreciation of the market potential associated with golf on the part of many airline executives and members of the travel industry. As a consequence, the amount of inbound tour packaging has been limited.

Those golf-oriented tour operators resident in our primary markets—particularly California—consider our potential for growth of this traffic to be fair to excellent. They are interested in doing more business with British Columbia but want more information about the golf products and services. Unfortunately, several tour operators have had some negative experiences dealing with components of the travel industry and this causes them to be hesitant about expanding their programs.

Market Priorities

In the Market Analysis chapter, the golf tour market was segmented on the basis of market origin and trip type. Table 17 provides a matrix of those segments considered of most importance to British Columbia in the short and long-term and the consultants have assigned a priority rating to each.

The ardent recreational golfer resident in Alberta, Washington and Oregon should be targeted first. Several regional associations have had considerable success in these markets with fairly modest promotions. The involvement of one or two air carriers should be sought to create more fly-drive packages tailored for the Spring and Fall shoulder season.

Table 17
MARKET PRIORITIES BY MARKET SEGMENT

	ALBERTA	WASHINGTON/OREGON	CALIFORNIA	JAPAN
Ardent Recreational	1	1	3	3
Casual Recreational	2	2	2	n/a
Corporate/Executive	4	4	4	n/a

Second in priority are the Casual Recreational Golfers—ie those visitors who are in B.C. visiting friends or relatives or on touring vacations etc whose length of stay and expenditures could be increased if they were encouraged to play golf several times during their stay. Since these golfers appear to be less demanding in their choice of course and since many golf courses outside the Lower Mainland have not yet reached capacity in terms of utilization, it makes sense to improve the business on existing courses as soon as possible.

Third in priority in terms of timing but possibly of greatest importance in the long-run is the Ardent Recreational Golf segment originating in California and Japan. Both markets demand high quality facilities, excellent levels of service and a full array of supporting hospitality services. Our capacity to satisfy this market is currently limited. If a medium-term development strategy were prepared and implemented, however, the provision of a high quality golf tour product could yield significant economic benefits to British Columbia.

4.2 MARKETING RECOMMENDATIONS

If the Ministry of Tourism, Recreation and Culture decides to place more emphasis on the golf tourism market, then ideally a marketing strategy for this sector, which integrates with the Ministry's broader marketing objectives should be prepared. In the meantime, the following practical steps are recommended to improve awareness of B.C. as a golfing destination and, of equal importance, to ensure that both the travel industry and the golfing community is prepared for the growth that will take place:

1. *Inform the Market*—The tour operators, travel influencers and "golf influencers" in our primary market areas should be better informed about our product. We recommend that the Ministry conduct a carefully researched familiarization tour of a cross-section of golf products and facilities in September 1988. Invited participants would include the product development managers of in-bound airlines and golf tour operators, selected travel writers from the golf media and the travel trade press, representatives from PGA Tour, Golf Group '88 and Golf Card International, a few influential golf pros and club officials who are well known and respected in the Southern U.S.

and Japan. Ideally, the familiarization tour would include a few golfing celebrities and could incorporate a Fam Tour tournament to stimulate attendant publicity.

2. *Educate the Industry*—A workshop/seminar could be organized for members of the golfing community and the B.C. travel industry who wish to acquire practical information about the golf market, ways of creating successful packages, marketing and promotional tactics etc. Successful case studies of courses located both in B.C. and in competitive destinations should be highlighted.

   The seminar would be scheduled to take place the day after the completion of the familiarization tour described above so that in the afternoon session participants in the fam tour from outside the province could share their perspectives of British Columbia's strengths and weaknesses. They would be available to answer practical questions from golf managers and travel industry representatives concerning the action steps necessary to reach their market.

   During the last few hours of the seminar, buyers and sellers of golf tour product would be encouraged to meet, make future contacts and do business.

3. *Provincial Co-ordination*—Because the initiatives to develop the golf tour market have been so fragmented and un-cordinated in the past, steps will need to be taken to integrate the community and regional initiatives into a provincial strategy. We recommend, therefore, that consideration be given to the formation of Golf Marketing Advisory Council run on similar lines to the Ski Marketing Advisory Council. Initiative for forming this council should rest with those golf course managers who are most interested in developing business from outside the area but participation should include representatives from the travel sector ie airlines and lodging who are most likely to benefit from a growth in package tour development.

   The Golf Marketing Advisory Council could work closely with the Ministry of Tourism, Recreation and Culture and the managers of the nine regional tourism associations to avoid duplication of initiatives, to develop a provincial strategy, to encourage the development of attractive and innovative golf packages and to share marketing expertise and research between participants.

4. *Provincial Golf Guide*—At the present time there are two primary sources of information about the golf courses in British Columbia. Alan Dawe's book, titled *The Golf Courses of British Columbia*, which is sold commercially in bookstores and pro shops and, therefore, of little application as a fulfillment piece and the B.C. Golf Guide. The latter publication has a circulation of 15,000 via golf clubs and golf equipment stores. While it contains useful information about the attributes of each course, it does not contain much tourism-related information concerning attractions, supplementary activities and hospitality services that would encourage a decision to visit a community or region. Five of the nine tourism regions are either producing or planning to produce their own "Regional Golf Guides" to act as fulfillment literature.

While these are useful in the close-to-home markets of Alberta and Washington, where awareness of the regional differences in the province is greatest, their value in helping a golfer in California, Arizona or Chicago decide to visit the province is limited. In this context, we recommend that consideration be given to the production of a Provincial Golf Guide that is an expanded version of the B.C. Golf Guide. Production could continue to be the responsibility of the private sector and the costs covered by advertising sales but the directory could be subsidized by the ministry to cover the extra costs of including general tourist information/ copy to improve awareness of B.C. as a vacation destination.

5. *Package Tour Development*—There is a real need to improve the number, variety and quality of golf tour packages available to the consumer. These will be most successful if developed by tour operators who know the needs and preferences of their own clientele. We recommend that the ministry and the Golf Marketing Council encourage tour operators, airlines, some key hotels and managers from golf courses keen to develop more tourist business to network on a regular basis and "test market" golf packages in different markets eg fly-drive packages out of Portland or a golf clinic package out of Edmonton and Calgary.

6. *Improve Market Intelligence*—There is a need to quantify the market more accurately than was possible in this project. Hard data on the numbers of golf rounds played by tourists, the origins of these players, their perceptions, levels of satisfaction, demographics and potential for repeat business will best be determined from a survey of golfers at a sample of B.C. courses. We recommend that the Ministry of Tourism, Recreation and Culture sponsor a survey similar to the one undertaken annually on alpine and cross country skiing by the Ministry of Economic Development. The survey should take place in 1988. At its conclusion, and as part of the seminar described above, golf club managers could be shown not only simple techniques for tracking their clientele but ways of using such information to make their enterprises more profitable.

7. *Encourage International Tournaments*—Efforts should be taken to encourage national and international championship tournaments to take place in British Columbia. Provided such tournaments have large corporate sponsors and well known "star" professional golfers, they can attract extensive broadcast and cable television coverage. According to an article in *USA Today*, May 13, 1987, "Golf is the only sport (among all televised sports in terms of ratings) consistently up at the networks."

Such publicity can usually out perform most advertising that could be justified by the government and the private sector in those long-haul markets with greatest long-term potential. Emphasis should perhaps be given to ladies tournaments. Advertisers are turning away from those sports that appear to be exclusively male- dominated because the decision to purchase large consumer durables and the growth of purchasing power is increasingly being made by women. At the same time, the popularity of golf with women working outside of the home is increasing steadily.

The prestigious PGA TOUR organization has expressed an interest in investigating the possibility of including British Columbia on either its PGA TOUR or SENIOR TOUR circuit. At the present time, the PGA TOUR sponsors the Canadian Open at the Glen Abbey course in Toronto. The only tournament sponsored in the Pacific Northwest is the SENIOR TOUR (GTE Northwest Classic) Inglewood Country Club in Seattle. Such interest should certainly be encouraged as such major events are a major help in putting B.C. on the international golfing map.

In light of British Columbia's success with the development of a film industry and its positioning as the "Hollywood of the North" and in light of a traditionally close relationship between the entertainment and golf communities, it might be desirable to consider sponsoring a Celebrity Tournament that attracted those celebrities who have filmed here to play in a golf tournament in British Columbia. Such an event would attract significant media coverage and would help position B.C. as the "in" place to visit and the"in" place to play golf. Such an approach, while modest by comparison, would capitalize on our success with Expo 86 in Vancouver and the Olympics in Calgary.

8. *Convention/Meetings Market*—There is a real need to bring together the people responsible for marketing Vancouver and Victoria's convention and meeting facilities with the suppliers of golf product. Sales managers of downtown hotels and convention/meeting ground handlers consistently complained of a lack of capacity or inability to get their clients on the courses of their choice. At the same time, some club managers indicated that there was room for more business at certain times of the day or week. The direct and indirect economic and financial benefits of servicing small, exclusive groups of influential business executives needs to be sold to some of the more prestigious clubs. Positive treatment of such personnel can have positive spin-offs for the community and the province. *Golf Plus* in Toronto has had considerable success in getting their clients on exclusive courses that were considered by the Convention Bureau to be "off limits" to out-of-town visitors because their expertise enables them to make an attractive case to the club managers.

9. *Japanese Market*—While Japan has been highlighted as a potentially good source of future tourist golfers, this market should be pursued with caution and a commitment to research. If Japanese tour wholesalers have negative experiences in the early stages of developing this business, they will by pass the B.C. golf product for several years. Efforts need to be made to find out what the Japanese vacationer is looking for in the golfing experience: how important is the selection of course?, how long do they wish to play?, what goods should be available in the pro shop?, what food and beverage services are required?, do they wish instruction?, what photographic opportunities should be available? etc. The consultants recommend that before any action is taken to pursue this market more in-depth discussions be held with representatives of the Japanese golfing industry, including those companies that develop and market golf courses in and outside of Japan, and a selection of tour operators who are developing special interest tours to Canada, Hawaii, the U.S. and Australia.

10. *Canada West Approach*—Marketing British Columbia as a golf destination in the long-haul markets of Southern California,Arizona, Texas and Japan will be difficult if this effort is not made under a "Canada West" umbrella. Future development of packages designed to be sold in these markets should take into account golf resorts and destinations in the Alberta Rockies which have traditionally had so much appeal to visitors from long-haul origins. Such an integrated approach with Alberta will likely make it easier, not harder, to position the resorts in the B.C. Rockies attractively to these distant markets.

4.3 PRODUCT SUMMARY

- As of the summer of 1986, there were 72 18-hole and 68 9-hole golf courses in British Columbia.
- Over half of all the courses are located in Vancouver Island and South Western B.C.
- Most of the purchasers of golf vacation packages (ie the Ardent Recreational Golfers) prefer 18 hole golf courses and championship courses with good clubhouse facilities. There is a shortage of capacitiy of this type of course in the peak season, and at weekends on Vancouver Island, South Western B.C. and , to a slightly lesser extent, the Okanagan-Similkameen.
- Many 9-hole courses could appeal to the Casual Recreational Golfer whose time and budget are more limited.
- The single most important factor affecting the ability of individual clubs to cater to visiting golfers is type of ownership. Of the 140 clubs in British Columbia, 91 are municipal and public clubs, 36 are semi-private and 13 are private.
- While private clubs are often the best known and frequently sought after (eg Shaughnessy, Point Grey, Royal Colwood, Uplands) they have least available capacity to cater to non-members. Most private clubs are also located near Vancouver and Victoria.
- There is a shortage of public facilites in Greater Vancouver and, to a lesser extent, Victoria. Many public courses are already operating at peak capacity. Fraserview, for example, handles 90,000 rounds a year, and University Golf Club is approaching 80,000.
- Relatively few of the municipal courses are operated on a profitable basis; University Golf Club provides an excellent example of what can be done when a municipal course is leased to and managed by a private sector, profit-oriented corporation.

- British Columbia has relatively few courses that form part of a large resort complex. Whistler will have 5 courses within 30 minutes drive by the end of 1989; Harrison Hot Springs is planning to expand its course from 9 holes to 18 over the next two years and Fairmont and Radium both offer a resort setting although the access to major urban markets óther than Calgary is limited.The success of the recently opened Semiahmoo Resort south of Blaine, Washington, demonstrates the potential market for this kind of complex.

- Approximately 30 clubs, equivalent to 20% of the total are currently involved in packages and over 70 would like to participate in the development of golf packages oriented toward non-resident visitors.

- At the present time, over 50 golf travel packages are available. Most are short duration, modestly priced hotel and resort packages featuring one course which appeal to resident and close-in markets. There are relatively few packages of sufficient quality to appeal to the more discerning Ardent Recreational Golfer located in the long-haul markets of Southern California or overseas.

- The most important current locations for golf package activity include Victoria, Whistler, Harrison, Gallagher's Canyon, Kelowna; Kokanee Springs, Crawford Bay; 108 Mile Resort, Fairmont and Radium.

- There are five main regions where golf course development is most needed in order to cater to an expanding residential market and in order to realize the non-resident visitor potential: Vancouver Island, Southwestern B.C., the Okangan-Similkameen, Kootenay Country and the Rocky Mountain Region.

4.4 DEVELOPMENT RECOMMENDATIONS

While the primary focus of the study was to provide an overview of the market for golf-related tourism, the consultants submit the following development recommendations for consideration:

1. The Ministry of Tourism, Recreation and Culture could undertake the preparation of a Golf Development Strategy in order to maximize both the recreational and the tourist potential afforded by this sport. Such a strategy should comprise the following:

    - a more detailed inventory and analysis of the current supply of facilities that includes an evaluation of the tourist potential ie club house facilities, food,beverage, retail and après-golf amenities, access to suitable accommodation and transportation access;

- a compilation of data regarding proposed courses (note: many real estate developers are currently including 9-hole courses to service the recreational needs of growing retirement communities. Awareness of the tourist potential might encourage them to build larger more deluxe facilities that could attract the non-resident golfer);

- a compilation of data from the municipalities regarding available and suitable land for golf course development. Once a marketing strategy has been established the Ministry could take a more proactive role in attracting investors and developers by maintaining a data base on supply and demand. At the present time, municipalities and the A.L.R. are considering applications for golf course development based on local demand only. In the absence of hard data, the tourism implications of such developments are not being given due consideration.

2. The Ministry should consider allocating three personnel to be responsible for golf albeit on a part-time basis—one from each of the following aspects of the Ministry: development, recreation and sport and marketing. These staff should communicate frequently with each other to ensure the marketing and development initiatives are co-ordinated.

3. The Ministry could take a proactive role in identifying investors and developers who are interested in developing courses and resort communities that involve golf. The provision of information about tourist markets, the assurance of on-going marketing support and the ability to work with regional districts and municipal planning authorities may speed development. The interest expressed by the PGA in the potential for a TPC course should be explored as should contacts with Canadian and international golf resort developers. By studying successful case studies, the Ministry can advise developers who had not previously considered the tourist market on the ingredients of a course that ensure tourist golfers are attracted to the facility. Until there is a commitment to encourage the development of international-class golf courses in British Columbia, the full long-term potential of the long-haul markets will not be realized.

APPENDIX A

SELECTED PRINT MEDIA SPECIALISING IN GOLF

GOLF DIGEST
6100 Wilshire Boulevard
Suite 720
Los Angeles
California
90049

(213)934-1191

Bob Bauer
Account Executive
GOLF ILLUSTRATED
3 Park Avenue
New York
New York 10016

(212)340-4831

Darlene A. Gentle
GOLF MAGAZINE
3 Church Street
Suite 503,
Toronto, Ontario
M5E 1M2

(416)862-0603

Bill Roland
Director Advertising
THE GOLF TRAVELER
1137 East 2100 South
PO Box 6439
Salt Lake City
Utah 84016

(801)486-9391

Mike Cassidy
National Account Supervisor
SCORE MAGAZINE
287 MacPherson Avenue,
Toronto, Ontario
M4V 1A4

(416)928-2909

R.W. (Bob) Rogers
Sales Manager
FORE! BRITISH COLUMBIA
Fairway Publishing Ltd.,
203-1134 Homer Street
Vancouver, B.C.
V6B 2X6

(604)685-9106

Don Sylvester
B.C. GOLF GUIDE
Sylvester Publications Ltd.,
201, 6430 Golden West Avenue
Red Deer, Alberta
T4P 1A6

(403)347-4660

APPENDIX B

SELECTED TOUR OPERATORS, AIRLINES AND AGENTS SELLING GOLF PACKAGES INTO B.C.

Mike Roseto
WIDE WORLD OF GOLF
P.O. Box 5217
Carmel
California
93921

(408) 624 6667

Lisa Irvin
EDDIE LEWIS INTERNATIONAL GOLF SAFARIS
Suite 106-14429 Ventura Boulevard
Sherman Oaks,
California
91423

(818)788-5991

Lois Williamson
GOLF LINKS INTERNATIONAL
Suite No 5
4134 Atlantic Avenue
Long Beach, California
90805

(213) 595 6905

Bob Barnes
Product Development Manager
Canada Express-Treasure Tours
500-1200 West 73 Ave
Vancouver, B.C.
V6P 6G5

(604)264 4203

Bernhard Reumann
President
GETAWAYS TRAVEL & TOURS
Suite 127
30423 Camwood Street
Augora Hills, California
91031

(818) 991 7015

Claire Ash
Leisure Product Development Manager
CANADIAN AIRLINES
1055 Dunsmuir
Vancouver, B.C.
V7X 1R9

(604)641-2000

Fred McLean
TORTUGA EXPRESS
P.O. Box 4384
Anaheim
California
92803

(714)774 3121

Hans Natzki
PRO TOURS
717 West Pender Street
Vancouver, B.C.

(604)685-6116

John Fenez
Manager, Sales Development
AMERICAN AIRLINES
PO Box 619616
Dallas/Fort Worth Airport
Texas
75261-9616

(817)355-1707

Sally Ogilvie
GOLF HOLIDAYS
64 Vaughan Road, Suite 300
Toronto, Ontario
M6G 2N4

(416)656-6502

Tak Onaga
Manager
Purchasing & Reservations
JAPAN TRAVEL BUREAU
PO Box 49317
2300-1055 Dunsmuir Street
Vancouver, B.C.
V7X 1L3

(604)688-0166

Miles Desharnais
ATLAS TRAVEL WOODSIDE
209-700 West Pender
Vancouver, B.C.
V6C 1G8

(604)669-6665

Jack Webb
GOLF HOLIDAYS WEST
205-788 Beatty Street
Vancouver, B.C.
V6B 2M1

(604)669-1434

Rob Horner
GREAT ESCAPE VACATIONS
100-10711 Cambie Road
Richmond, B.C.
V6X 3G5

(604)273 9100

APPENDIX C

INVENTORY OF GOLF CLUBS OFFERING NINE OR EIGHTEEN HOLES

In interpreting the inventory tables, the following points should be noted.

Each club is given a unique identification symbol. The symbol combines a letter and a number. The nine letters (A-I) denote the tourism region in which the golf club is located. The number is assigned in an order prescribed by the name of the nearest community to the golf club as described under Name/Location.

Name/Location — The numerical sequence of the golf clubs follows the alphabetical order of the names of major communities within the region. This is consistent with the order in the final appendix, Tourism British Columbia's 1987 publication *How Do You Do Golfing In British Columbia*. Additional details on individual golf courses are contained in this Appendix. Where the name of the community is not included in the name of the golf club, the community name is also noted under name/location.

Rating — Course ratings indicate the degree of challenge offered by the courses. The number is based on the number of times the ball is hit by an expert golfer to complete 18 holes. The number is known as the course rating for the course. More challenging courses generally have a rating of 70 or more. The higher the number the more difficult it is to play the course. Separate ratings are supplied for men and ladies from lists provided by the mens and ladies golf associations. The Associations inspect golf courses according to guidelines set by the Royal Canadian Golf Association and Canadian Ladies Golf Association. Red, white, blue, yellow and gold ratings indicate differences in the way a course can be played.

Ownership — For inventory purposes, municipal course are included with public clubs under the term public. Private and semi-private clubs are differentiated.

Number of Packages — Number of golf packages at each golf club.

APPENDIX C

INVENTORY OF GOLF CLUBS OFFERING NINE OR EIGHTEEN HOLES

VANCOUVER ISLAND TOURISM REGION

#	NAME/LOCATION	NUMBER OF HOLES	RATING M	RATING F	OWNERSHIP	NUMBER OF PACKAGES
A 1	Campbell River Golf & Country Club	9	69.5	72	Semi-private	0
A 2	Pacific Playground Golf Course Saratoga Beach, Oyster River	9	62	63	Public	0
A 3	Mount Brenton Golf Club Chemainus	9	69	72	Public	0
A 4	Comox Golf Club	9	65	70	Semi-private	0
A 5	Glacier Greens, Comox	9	68	72	Private	0
A 6	Sunnydale Golf Society, Courtenay	18	67.5	70.5	Public	0
A 7	Gabriola Golf and Country Club	9	67	68	Public	0
A 8	Galiano Golf & Country Club	9	64	59	Public	0
A 9	Pender Island Golf & Country Club	9	61.5	63.5	Public	0
A 10	Pender Harbour Golf Club	9	69	69	Public	0
A 11	Saltspring Island Golf & Country Club	9	69	70	Private	0
A 12	March Meadows Golf & Country Club Lake Cowichan	9	68.5	70 Red 72 White	Semi-private	0
A 13	Cowichan Golf & Country Club, Duncan	18	70	73	Public	0
A 14	Nanaimo Golf & Country Club	18	71.5	72.5 Red 76.5 White	Semi-private	0

#	NAME/LOCATION	NUMBER OF HOLES	RATING M	RATING F	OWNERSHIP	NUMBER OF PACKAGES
A 15	Alberni Golf Club Ltd. Port Alberni	9	67.5	71	Public	0
A 16	Long Beach Golf Course Ucluelet	9	71.5	74	Public	0
A 17	7 Hills Golf Course Port Hardy	9	69.5	70 Red 71 White	Public	0
A 18	Port Alice Golf & Country Club	9	59.5	62	Private	0
A 19	Eaglecrest Golf Club Qualicum Beach	9	69	72.5	Public	2
A 20	Qualicum Beach Memorial Golf Club	9	66	67	Public	0
A 21	Sooke Broome Hill Golf & Country Club	9	62	65	Public	0
A 22	Ardmore Golf & Fitness Club Sidney	9	66	68	Public	1
A 23	Cedar Hill Municipal Golf Club Victoria	18	64	65	Public	0
A 24	Glen Meadows Golf & Country Club Victoria	18	71	73	Semi-private	1
A 25	Gorge Vale GolfClub Victoria	18	71	74	Semi-private	0
A 26	Metchosin Golf & Country Club, Victoria	9	65	68	Public	0
A 27	Prospect Lake Golf Course, Victoria	9	59	63	Public	0
A 28	Royal Oak Golf Victoria	9	66	68	Public	0
A 29	Royal Colwood Golf & Country Club Victoria	18	70	74 Red 76 White	Semi-private	1
A 30	Victoria Golf Club	18	69	73 White 74.5 Blue	Private	0
A 31	Uplands Golf Course Victoria	18	69.5	73	Semi-private	1

TOTAL NUMBER OF CLUBS INVOLVED IN PACKAGES—5

SOUTHWESTERN B.C. TOURISM REGION

#	NAME/LOCATION	NUMBER OF HOLES	RATING M	RATING F	OWNERSHIP	NUMBER OF PACKAGES
B 1	Ledgeview Golf & Country Club Abbotsford	18	69	72	Public	0
B 2	Burnaby Mountain Golf Course & Driving Range	18	68	70	Public	0
B 3	Chilliwack Golf & Country Club	18	68	72.5	Semi-private	0
B 4	Meadowlands Golf & Country Club Chilliwack	18	64	69	Semi-private	0
B 5	Camoustie Golf & Racquet Club Port Coquitlam	18	70	71	Public	0
B 6	Vancouver Golf Club	18	70	4 Yellow 76 White	Private	0
B 7	Beach Grove Golf Course 74 White Delta 76 Blue	18	71	72.5 Yellow	Private	0
B 8	Delta Golf Course	18	69	71.5	Public	0
B 9	Tsawwassen Golf & Country Club Ltd.	18	60	62	Public	0
B 10	Fort Langley Golf & Country Club	18	72	71	Public	0
B 11	Newlands Golf and Racquet Club Langley	18	65	72	Public	0
B 12	Harrison Golf Course	9	72	71 Yellow 75 White	Public	2
B 13	Hope Golf & Country Club	9	70	73	Semi-private	0
B 14	Tall Timber Golf Club	18	66	67.5	Public	0
B 15	Maple Ridge Golf Course	9	65	66	Public	0
B 16	Meadow Gardens Golf Course Pitt Meadows	18	67	71.5	Semi-private	0
B 17	Pitt Meadows Golf Club	18	71	71	Semi-private	0
B 18	Iron Mountain Golf Club Mission	18	72	76	Public	0
B 19	Mission Golf & Country Club	9	69	73	Semi-private	0

#	NAME/LOCATION	NUMBER OF HOLES	RATING M	RATING F	OWNERSHIP	NUMBER OF PACKAGES
B 20	Seymour Golf & Country Club North Vancouver	18	71.5	73	Semi-private	0
B 21	Greenacres Golf Course Richmond	18	67	73	Public	0
B 22	Mylora Golf Course Richmond	18	50	49	Public	0
B 23	Quilchena Golf & Country Club Richmond	18	69.5	72 Red 74 Gold 76.5 White	Private	0
B 24	Richmond Country Club	18	70.5	72 Red 76.5 White	Private	0
B 25	Squamish Golf Course	18	71	72.5	Semi-private	0
B 26	Whistler Golf Club	18	73 Blue 71 White	72 Red 74.5 White	Public	12
B 27	Sheep Pasture Golf & Country Club Lilloet	9	62	64	Public	0
B 28	Powell River Golf Club	9	69	70	Public	0
B 29	Sunshine Coast Golf & Country Club Roberts Creek	9	65	69	Semi-private	0
B 30	Guildford Golf Course Surrey	18	6	-	Public	0
B 31	Hazlemore Golf & Tennis Club Surrey	18	70	72	Semi-private	0
B 32	Nico Wynd Golf Club Surrey	9	68	71	Public	0
B 33	Peace Portal Golf Course Surrey	18	70	74 Red 76.5 Blue	Public	0
B 34	Surrey Golf Course	18	70.5	72	Public	0
B 35	Fraserview Golf Course Vancouver	18	69	72	Public	0
B 36	Langara Golf Club Vancouver	18	69	70.5	Public	0
B 37	Marine Drive Golf Club Vancouver	18	69	72.5 Red 74.5 White 75.5 Blue	Private	0
B 38	McCleery Golf Course Vancouver	18	69	70 Red 71.5 White	Public	0
B 39	Musqueam Golf Centre Vancouver	18	53	52	Public	0

#	NAME/LOCATION	NUMBER OF HOLES	RATING M	RATING F	OWNERSHIP	NUMBER OF PACKAGES
B 40	Point Grey Golf & Country Club Vancouver	18	71.5	73.5 Yel. 76 White 78.5 Blue	Private	0
B 41	Shaughnessy Golf and Country Club Vancouver	18	71.5	75.5	Private	0
B 42	University Lands Golf Course Vancouver	18	68	70	Public	0
B 43	Capilano Golf & Country Club West Vancouver	18	70	74	Private	0
B 44	Gleneagles Golf Course West Vancouver	9	66.5	68	Public	0

TOTAL NUMBER OF CLUBS INVOLVED IN PACKAGES—2

OKANAGAN/SIMILKAMEEN TOURISM REGION

#	NAME/LOCATION	NUMBER OF HOLES	RATING M	RATING F	OWNERSHIP	NUMBER OF PACKAGES
C 1	Twin Lakes Golf & Country Club Kaleden	18	70	71	Public	1
C 2	Central Park Golf Club Kelowna	9	70	73	Public	0
C 3	Gallaghers Canyon Golf Resort Ltd. Kelowna	18	71.5	74	Public	2
C 4	Kelowna Golf & Country Club	18	70	73	Semi-private	0
C 5	Lumby Golf Club Lavington	9	63	64	Public	0
C 6	Cherry Grove Golf Course, Oliver	9	69.5	72.5	Semi-private	0
C 7	Fairview Mountain Golf Club Oliver	9	72	70	Public	0
C 8	Osoyoos Golf & Country Club	18	70.5	73	Public	2
C 9	Ponderosa Golf & Country Club	9	69	71	Semi-private	0
C 10	Penticton Golf & Country Club	18	69	72 Red 74 White 75 Blue	Semi-private	1
C 11	Princeton Golf Club	9	71	74	Public	0
C 12	Summerland Golf & Country Club	18	70	69 Red 72.5 White	Public	1
C 13	Spallumcheen Golf & Tennis Club	18	67	69.5	Public	0
C 14	Shannon Lake Golf Club Westbank	9	67.5	72	Public	0
C 15	Vernon Golf & Country Club	18	69	72	Public	0

TOTAL NUMBER OF CLUBS INVOLVED IN PACKAGES—5

KOOTENAY COUNTRY TOURISM REGION

#	NAME/LOCATION	NUMBER OF HOLES	RATING M	RATING F	OWNERSHIP		NUMBER OF PACKAGES
D 1	Castlegar Golf Course	18	71.6	76 Red 77 White	Public		1
D 2	Christina Lake Golf & Country Club	9	75	72 Gold 74 Red	Semi-private		1
D 3	Creston Golf Course	9	70	74	Public		1
D 4	Kaslo Golf and Country Club	9	67	73	Public		2
D 5	Nakusp Centennial Golf Club	9	63.5	63.5	Public		1
D 6	Kokanee Springs Golf Club Crawford Bay	18	71	74	Public		4
D 7	Nelson Golf & Country Club	9	65	68.5	Semi-private		0
D 8	Birchbank Golf Course Rossland-Trail	18	70	75	Public		5
D 9	Rossland-Trail Country Club	9	69	75	Public		5
D 10	Salmo District Golf Club	9	67	69	Public		0
D 11	Slocan Lake Golf Club	9	65	71	Semi-private		1
D 12	Valley View Country Club Winlaw	9	69	73	Public		0

TOTAL NUMBER OF CLUBS INVOLVED IN PACKAGES—9

HIGH COUNTRY TOURISM REGION

#	NAME/LOCATION	NUMBER OF HOLES	RATING M	RATING F	OWNERSHIP	NUMBER OF PACKAGES
E 1	Sunshore Golf Club Shuswap Lake, Chase	9	60	64.5	Public	0
E 2	Anglemont Estates Golf and Country Club	9	68	73	Semi Private	0
E 3	Shuswap Lake Estates Golf Course Blind Bay	9	67	73	Public	0
E 4	Kamloops Golf & Country Club	18	70	71 Red 74 White 75.5 Blue	Semi-private	0
E 5	Rivershore Golf Club	18	71	76	Public	0
E 6	Merritt Golf & Country Club	9	68	68	Public	0
E 7	Nicola Valley Golf Course	9	68	70	Public	0
E 8	Revelstoke Golf Club	18	71	75	Public	
E 9	Salmon Arm Golf Course	18	67.5	67 Gold 71 Red	Public	1
E 10	Eagle River Golf & Country Club Sicamous	9	62.5	65	Public	0

TOTAL NUMBER OF CLUBS INVOVLED IN PACKAGES—1

CARIBOO TOURISM REGION

#	NAME/LOCATION	NUMBER OF HOLES	RATING M	RATING F	OWNERSHIP	NUMBER OF PACKAGES
F 1	108 Mile Golf Club	18	71.5	74	Public	3
F 2	Quesnel Golf Course	18	66	70.5 Red 73 White	Semi-private	0
F 3	Williams Lake Golf & Country Club	18	70	72.5	Public	0

TOTAL NUMBER OF CLUBS INVOLVED IN PACKAGES—1

NORTH BY NORTHWEST TOURISM REGION

#	NAME/LOCATION	NUMBER OF HOLES	RATING M	RATING F	OWNERSHIP	NUMBER OF PACKAGES
G 1	Camoustie Golf Course Burns Lake	9	61.5	64	Public	0
G 2	Molyhills Golf Club Fraser Lake	9	70	73.5	Public	1
G 3	Houston Golf Course	9	67.5	70	Semi-private	0
G 4	Hirsch Creek Kitimat Golf Club	9	70.5	74	Semi-private	0
G 5	Aspen Grove Golf Club Prince George	9	65.5	68	Public	0
G 6	Prince George Golf & Curling Club	18	69	73.5 Red 74.5 White	Semi-private	
G 7	Prince Rupert Golf Club	18	67.5	72	Public	0
G 8	Willows Golf Course Sandspit	18	69	73	Public	0
G 9	Dixon Entrance Golf Club CFB Masset	9	65	66	Private	0
G 10	Smithers Golf Course	18	69.5	71	Semi-private	0
G 11	Skeena Valley Golf & Country Club	9	66.5	70	Semi-private	0
G 12	Omenica Golf Course	9	66.5	70	Public	0

TOTAL NUMBER OF CLUBS INVOLVED IN PACKAGES—1

PEACE RIVER/ALASKA HIGHWAY TOURISM REGION

#	NAME/LOCATION	NUMBER OF HOLES	RATING M	RATING F	OWNERSHIP	NUMBER OF PACKAGES
H 1	Dawson Creek Golf & Country Club	9	68	71.5	Public	0
H 2	Poplar Hills Golf Club Fort Nelson	9	67	70	Public	0
H 3	Lakepoint Golf & Country Club Fort St. John	18	71	73 Yellow 76 Blue	Semi-private	0
H 4	Mackenzie Golf Course	9	67	70	Public	0
H 5	Moberly Lake Golf Club	9	70	72	Public	0

TOTAL NUMBER OF CLUBS INVOLVED IN PACKAGES—0

ROCKY MOUNTAIN TOURISM REGION

#	NAME/LOCATION	NUMBER OF HOLES	RATING M	RATING F	OWNERSHIP	NUMBER OF PACKAGES
I 1	Cranbrook Golf & Country Club	18	71	72	Semi-private	1
I 2	Mountain Meadows Golf Club Elkford	9	71.5	69	Public	0
I 3	Fairmont Hot Springs Golf Resort	18	71	73	Public	1
I 4	Fernie Golf & Country Club	18	70.5	67.5	Public	1
I 5	Golden Golf and Country Club	9	66	68	Public	0
I 6	Kimberley Golf & Country Club	18 74 White	70	72 Red	Public	1
I 7	Radium Hot Springs Golf Resort	18	65	67	Public	1
I 8	Sparwood Golf Club	9	69	72.5	Semi-private	0

TOTAL NUMBER OF CLUBS INVOLVED IN PACKAGES—5

APPENDIX D

INVENTORY OF PACKAGES

In interpreting the inventory tables, the following points should be noted.

Region/Name/Location The tourism region is denoted at the beginning of each regional section and also by letter (A-I) as a prefix before each numbered package within a region.

The name of the package is provided where a special descriptive name is given for marketing purposes.

The locations of the golf club and hotel/resort property are indicated by the name of the community in bold print. In the event that the hotel/resort property and golf clubs are in different communities, both communities are noted.

Package Contents A list of the contents of the package.

Duration Number of nights. Most one day packages can be extended at the same daily rate.

Price Dollars Canadian unless U.S. is specified. Room costs are **per person** for double occupancy.

Availability Dates when package offered. If not specified, the packages are usually available during the normal playing season which runs from April to October but varies with location.

APPENDIX D

INVENTORY OF PACKAGES

REGION/NAME/LOCATION	PACKAGE CONTENTS	DURATION	PRICE	AVAILABILITY
Region A. Vancouver Island				
A1 The Bayside Inn **Parksville** with Eaglecrest Golf Club **Qualicum Beach**	2 nights 1 round golf 2 breakfasts 1 dinner racquetball or squash court time pool, swirlpool, sauna, weight room, tennis	2 nights	$113 $134	Sept 15-June 15 June15-Sept 15
A2 Marlin Thompson's Golf School, **Coombs** with Bayside Inn, Benbow Inn,Marianna's Gasthaus, Parry's Trailer Park	2 dinners 5 breakfasts 5 day golf school and dinner at Golf School golf at Eaglecrest	5 nights on accom-modation	$255-475 depending	Apr.1-Sept.30
A3 Golf by the Sea Huntingdon Manor Inn **Victoria** with various local clubs	golf, golf cart & rental of clubs breakfast room car rental	2 days 6 days	$229 $495	Oct.15-June30
A4 Ardmore Golf & Fitness. Club **Victoria** with Sidney Travel Lodge, Motel 66, Emerald Isle Motel	Discounts on Green Fees for clients of three motels			
A5 Island Executive Tours with Royal Colwood Golf Club, Glen Meadows Golf and Country Club, and Uplands Golf Course **Victoria**	3 rounds golf, golfers own clubs delivered to each course, 1 breakfast 1 dinner, shopping arrangements, Victoria tour and salmon fishing, daily transportation	6 nights	$699 (US) (excluding travel to and from Victoria)	

REGION/NAME/LOCATION	PACKAGE CONTENTS	DURATION	PRICE	AVAILABILITY
Region B. Southwestern B.C.				
B 1 Arnold Palmer Golf Special Blackcomb Lodge **Whistler**	1 round golf dinner room	1 day	$ 65	May 1-Nov.15
B 2 Arnold Palmer Golf Mountainside Lodge **Whistler**	1 round golf room	1 day	$ 50 ($ 55 July/ August)	
B 3 Mid-Week Golf Special Mountainside Lodge **Whistler**	1 round golf room dinner	1 day	$ 65	May 1-Nov.15
B 4 Whistler Golf Holiday Nancy Greene's Olympic Lodge **Whistler**	2 rounds golf room 3 breakfasts	3 days	$174	May-Oct.
B 5 Deluxe Golf & Instruction Holiday Nancy Greene's Olympic Lodge **Whistler**	4 nights 4 breakfasts 3 dinners 3 days golf 2 hour lessons minimum 3 rounds of golf balls, power cart club cleaning and storage	4 days	$475	June15-Sept.15
B 6 Whistler Golf Bargain Package Fitzsimmons Creek Lodge, **Whistler**	golf room breakfast	2-3 days	Available on request	May-til frost
B 7 Clock Tower Hotel **Whistler**	room green fees	1 night $45		
B 8 Crystal Lodge **Whistler**	room 3 rounds 1 round	3 nights 1 night	$145 $ 55	
B 9 Delta Mountain Inn **Whistler**	room 1 round golf	1 night	$ 64	From June 1
B 10 Fireplace Inns **Whistler**	room golf	3 nights mid-week	$226 $241 week-end	June-October
B 11 Tantalus Lodge **Whistler**	room golf	nightly rate	$ 49 weekdays $ 59 weekends	May 1 - End of season
B 12 Twin Peaks Accommodations **Whistler**	room at choice of 4 properties green fees	From $42 (2 day minimum)		

REGION/NAME/LOCATION	PACKAGE CONTENTS	DURATION	PRICE	AVAILABILITY
B 13 Whistler Timberline Lodge **Whistler**	room golf	2 nights		
B 14 Clubhouse Special The Harrison Hotel **Harrison Hot Springs**	golf, room breakfast & dinners bike ride back massage	3 days & 4 days	Seasonal Varied	All year, exc. Christmas and Easter
Region C. Okanagan-Similkameen				
C 1 Golf Capri Capri Hotel Gallaghers Canyon Golf Resort **Kelowna**	room champagne (1st night) green fees	daily	$ 39.95	
C 2 Championship Golf Lake Okanagan Resort Gallaghers Canyon Golf Resort **Kelowna**	3 nights 2 rounds golf	Sun-Tues	$159	May 3-June 28
C 3 Osoyoos Golf and Country Club Oasis Campground **Osoyoos**	room golf	usually weekly	varied	
C 4 Delta Lakeside, **Penticton** with Penticton Golf and Country Club, Twin Lakes Golf and Summerland Golf and Country Club and Osoyoos Golf and Country Club	room golf	daily	$ 43	
Region D. Kootenay Country				
D 1 Ray Lyn Motel **Trail** with Rossland Trail Country Clubs	room, 27 holes dinner	1 night	$ 49.95	
D 2 Uplander Hotel **Rossland** with Birchbank Golf Course and Rossland Trail Country Club	room 2 days golf	2 nights	$ 29.50	
D 3 Red Mountain Resort Golfers Delight **Rossland** with Rossland Trail Country Club	room 2 days golf	2 nights	$ 29	
D 4 Hi Arrow Motor Inn Motor Inn **Castlegar** with Castlegar Golf Course	room breakfast golf	1 night	$ 38	

REGION/NAME/LOCATION	PACKAGE CONTENTS	DURATION	PRICE	AVAILABILITY
D5 Fireside Motor Inn **Castlegar** with Castlegar Golf Course and Rossland Trail Country Club	room golf, 2 rounds 2 breakfasts	2 nights	$ 86.90	
D6 Lakeview Motel with **Christina Lake** Golf and Country Club	room dinner golf	1 night	$ 38.25	
D7 Lucerne Motel **New Denver** with **Slocan Lake** Golf Club	room 1 round golf breakfast	1 night	$ 24	
	room 1 round golf breakfast	2 nights	$ 45	
D8 Selkirk Inn with **Nakusp** Centennial Golf Club	room golf	1 night	$ 36	
D9 Mariner Inn **Kaslo** with Kaslo Golf and Country ClubAinsworth Hot Springs	room, golf dinner	1 night	$ 95	
D 10 **Balfour** Beach Inn with Kokanee Springs	room, golf Kaslo Kokanee Springs, Ainsworth Hot Springs	1 night	$ 54.95	
D 11 Alpine Motel	room special green fees at Nelson, Castlegar, Kokanee Springs	1 night	$ 34+green fees	
D 12 5 Day Package/ Sun-Friday, Kokanee Springs Golf **Crawford Bay**	2 meals per day golf & cart Resort	5 nights chalet	$384 $401	before May16 & after Sept.7 May16-Sept17
D 13 3 Day Package: May 3 - weekdays Kokanee Springs Golf Resort **Crawford Bay** (weekend packages also available)	2 meals per day golf, chalet and cart	3 nights	$230 $240	before May 16 & after Sept 7 May16-Sept7
D 14 Blue Falcon cruises with Kokanee Springs	Golf and Cruise Package	2 nights	$118 per night through Kokanee Yacht Charters (Winlaw)	
D 15 Downtowner Motel Inn **Creston** with Creston Golf Course	room	1 night golf	$ 33	

REGION/NAME/LOCATION	PACKAGE CONTENTS	DURATION	PRICE	AVAILABILITY
D 16 Downtowner Motor Inn **Creston** with **Kokanee Springs**	room golf	1 night	$ 46	
Region E. High Country				
E 1 **Salmon Arm** Golf Course, Shuswap Inn Best Western Village West Motor Inn	1 round 1 breakfast	1 day	$ 35-46.00	all year except July & August
Region F. Cariboo Region				
F 1 **108 Mile Golf Resort** Package 1	unlimited golf breakfast & dinner accomodation cleaning, storage of clubs, powercart driving range & all amenities		$ 79.00	
Package 2 handcart & cleaning and storage of clubs	unlimited golf all amenities		$ 49.00	
Package 3	unlimited golf accomodation resort amenities		$ 39.00	
Region G. North by Northwest				
G 1Glenannan Tourist Area, **Francois Lake** with MolyHills Golf Club and Birch Bay Resort Francois Lake Resort Stellako Lodge Resort	golf accomodation		varies with accommodation used	

REGION/NAME/LOCATION	PACKAGE CONTENTS	DURATION	PRICE	AVAILABILITY
Region I. Rocky Mountain				
I1 Cranbrook Golf Packages **Cranbrook** Golf Club Best Western Coach House Motor Inn	green fees accomodation	2-5 days	$ 79.00 2 d $119.00 3 d. $159.00 4 d. $189.00 5 d.	Mar1-June30
I2 **Fernie** Golf and Golf April - Oct. Country Club & Griz Inn, Park Place Lodge Cedar Lodge Motel Three Sisters Motel Anco Motel Snow Valley Motel Valley Motor Inn Inn Towner Motel	1 night Room		$ 33-44.00	
I3 Fairmont Par 72 Golf **Fairmont** Hot Springs Lodge	3 days unlimited golf swing clinic for 2 dinner for 2, welcome reception, hot pools, golf competition	3 days mid-week	$159.00 $169.00	Mar.22-Apr.15 Oct.18-Oct.29 Apr.20-Jun.18 Sept.6-Oct.15
I4 **Kimberley** Golf Club InnWest, Kirkwood Inn Green Carpet Golf Packages	golf room	2-5 days	$ 84. 2d $126 3d $168 4d $196 5d	Mid - April Mid - October
I5 Radium Hot Springs Golf Resort **Radium**	room, all resort amenities swimming, hot tub, whirlpool exercise gym, sauna, racquetball squash, tennis, massage, green fees	per day	$ 44.00 Midweek $ 51.00 Jun.25 - Sept. 7 $ 53.00	Year Round Except School Holidays
I6 Panorama **Invermere** with Radium Hot Springs Golf Resort	1 9-hole 'twilight' round 1 18-hole 'daylight' round 1 9-hole 'twilight' 2 18-hole 'daylight'	3 days 3 nights 5 days 5 nights	from $94 $145	

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